Prince Edward Island
TOURISM

POLICY, PLANNING & RESEARCH

ECONOMIC IMPACT
TOURISM 2000

DECEMBER 2000

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Introduction

Economic Impact: Tourism 2000 is Tourism PEI's annual report on visitations, visitor profiles and visitor expenditures for the mid-May to end of October tourism season. Throughout the season, visitor data are collected in several different ways with the data collection techniques designed to provide insights into a wide variety of visitor information, including:

a) visitor origins;
b) age;
c) employment status and income;
d) party type and size;
e) primary purpose of visit;
f) travel motivators;
g) trip planning process;
h) mode of travel;
i) length of stay;
j) main overnight destination;
k) main type of accommodation frequented;
l) "day trip" travel patterns while visiting;
m) activities experienced; and
n) expenditures by key expenditure categories.

The first section of Economic Impact: Tourism 2000 is a summary for Prince Edward Island overall. Section two explains the methodology used to collect and analyze the data. Sections three through 16 report on: 1) all pleasure private motor vehicle (PMV) and air visitors; b) pleasure PMV and air visitors by 10 visitor origin regions; c) business visitors; d) motorcoach visitors; and d) Japanese visitors. Section 17 profiles pleasure PMV and air visitors by 11 tourism regions based on where visitors in 2000 reported their "main overnight destination" to be.

Economic Impact: Tourism 2000 presents a small portion of the visitor data collected during the season. From the database of information available, special analysis can be done and reports generated. For more details and prices, contact the Policy, Planning and Research Division, Tourism PEI at 902.368.5907.

1. An Island Summary

For the past nine years, Tourism PEI has conducted an annual collection of travel data. The most current methodology includes:

a) intercepts of visitors exiting Prince Edward Island at the ferry, bridge and airport;
b) a quantitative follow-up telephone survey of pleasure and business visitors who depart via private motor vehicle and air;
c) a quantitative, in-person survey of visitors travelling via commercial touring motorcoach;
d) a quantitative survey of Japanese visitors using self-completed questionnaires; and
e) vehicle and passenger counts supplied by Strait Crossing Bridge Ltd., Northumberland Ferries Ltd., Charlottetown Airport Authority Inc., and motorcoach and Japanese accommodation operators.

A process of synthesis and analysis is then applied to the data, and summary estimates and descriptive statistics covering visitations, visitor profiles and visitor expenditures are published as an annual report. Economic Impact: Tourism 2000 is the ninth edition of Tourism PEI's annual analysis, and covers the period May 15 to October 31, 2000.

During this period, it is estimated that a total of 1.18-million pleasure and business visitors spent a total of $301.1-million while vacationing or conducting business in Prince Edward Island (Exhibits 1 and 2).

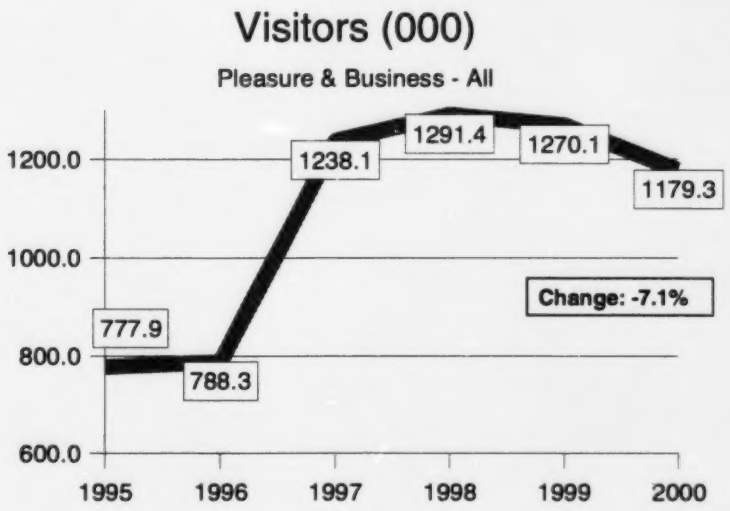


Exhibit 1

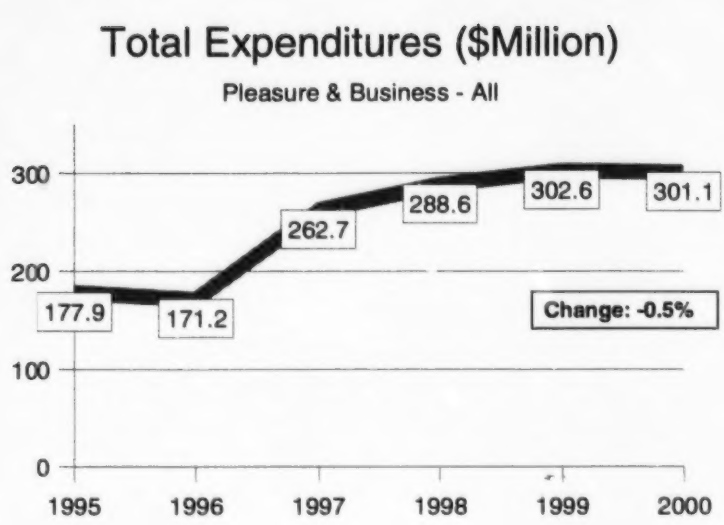
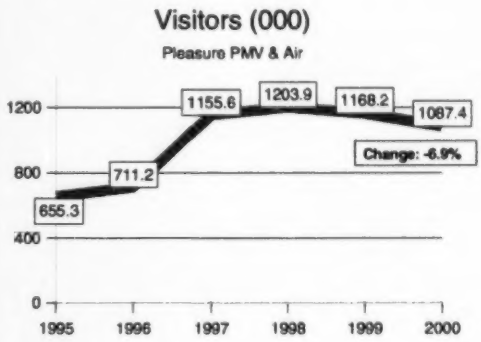


Exhibit 2

Overall, Prince Edward Island experienced a net visitor decline of 7.1% — approximately 90,800 visitors — compared to 1999. A strong 13.1% increase in motorcoach visitors was offset by a 6.9% decrease in pleasure private motor vehicle (PMV) and air visitors, and a 24.1% decrease in business PMV and air visitors (Exhibits 3, 4 and 5).



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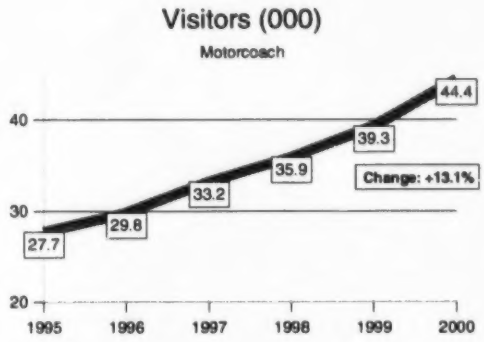

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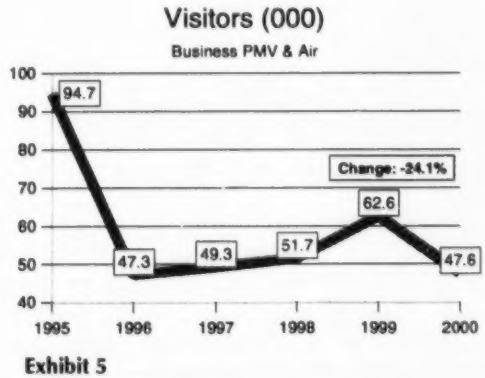


Exhibit 5

In 2000, pleasure PMV and air accounted for 92% of all visitors. For analysis purposes, visitors to Prince Edward Island are profiled in one of ten visitor origin regions shown below.

1. Newfoundland	2. Nova Scotia	3. New Brunswick	4. Quebec	5. Ontario
6. Other Canada	7. New England (U.S.A.)	8. Mid Atlantic (U.S.A.)	9. Other U.S.A.	10. International

Based on these visitor origins, visitation rankings for 1999 and 2000 are summarized in Exhibits 6 and 7.

	Visitors (000) Million		
	1999	**2000**	**% Chg**
Newfoundland	35.4	32.6	-8.1
Nova Scotia	239.6	211.9	-11.6
New Brunswick	121.3	128.9	+6.3
Quebec	100.0	77.1	-22.9
Ontario	306.5	271.4	-11.5
Other Canada	80.4	84.5	+5.0
New England	87.7	102.1	+16.3
Mid Atlantic	50.7	64.2	+26.7
Other USA	115.5	90.3	-21.8
International	31.0	24.5	-21.0
			-6.9

Exhibit 6

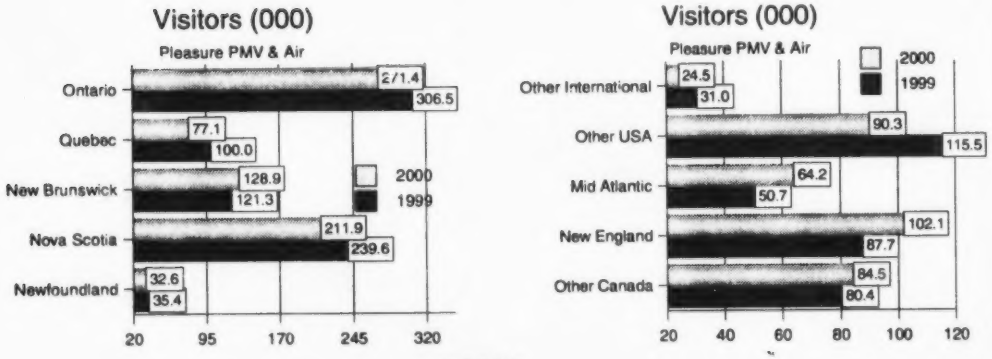


Exhibit 7

Decreases in pleasure PMV and air visitations in 2000 have been attributed to a number of factors, including:

a) inclement weather in Prince Edward Island;
b) high gasoline prices;
c) the Tall Ships celebration in Nova Scotia;

d) A continuation of Quebec's strong stay-at-home promotional efforts; and
e) the presidential election in the United States.

Increases in pleasure PMV and air visitations have been attributed to:
a) increased marketing in the New England and Mid Atlantic states; and
b) a partial recovery in visitations from New Brunswick.

Business PMV and air visitations declined 24.1% in 2000 following a 21.2% increase in 1999. Some of the decrease in 2000 can be attributed to:
a) inclement weather impacting short-haul (ie: Nova Scotia/New Brunswick) business/golf visitations; and
b) a strong meetings and convention market in 1999 that was not sustained in 2000.

Motocoach visitations increased 13.1% in 2000 over 1999, continuing an upward growth trend of more than five years. This continued growth can generally be attributed to a combination of: a) motorcoach marketing; b) PEI's appeal as a motorcoach destination; and c) the value of the U.S. dollar in Canada.

In 2000, it is notable that total expenditures were on par with 1999 despite the decrease in PMV and air visitations as well as a decrease in average length of stay. This is due to an increase in average party expenditure. Factors attributed to this increase include:
a) general price increases on-Island;
b) an increase in U.S. party market share from 22% in 1999 to 24% in 2000;
c) a decline in the percentage of pleasure parties that stayed in non-paid accommodations; and
d) an increase in party market share among higher income pleasure parties (Exhibit 8).

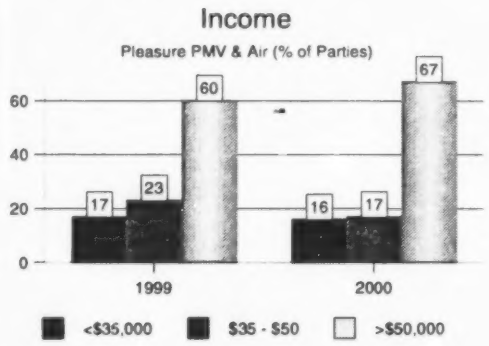


Exhibit 8

For 2000, the overall impact may be attributed to a larger share of parties with higher discretionary incomes, and a larger share of parties staying in paid accommodations with associated expenditures.

Each year, the follow-up telephone survey contains a "main overnight destination" question to identify the primary region where travel parties stayed. The results for 2000 are summarized in Exhibit 9 on the next page. Due to the small number of responses in most regions, results are sensitive to year-to-year volatility in share of market. In these cases, readers may find the direction of movement over three or four years more meaningful.

PMV & Air - "Main Overnight Destination" - Visitors (%)					
	Pleasure Only			Pleasure and Business	
Tourism Region	**1996**	**1997**	**1998**	**1999**	**2000**
Beaches	6	5	5	6	5
Cavendish	20	24	26	25	22
Charlottetown	35	29	30	32	34
Eastern Kings	4	3	4	4	7
Evangeline	2	2	2	1	1
Kensington	4	3	4	3	2
New London	4	2	2	1	1
Southern Kings	2	4	5	6	5
South Shore	2	4	5	4	4
Summerside	15	11	10	10	9
West Prince	4	5	4	3	3
Did not overnight	3	8	5	3	4

Note: To provide a better measure of total "main overnight destination" visitations, both pleasure and business visitors were reported starting in 1999. Comparable data is not available prior to 1999.

Exhibit 9

Historically, visitations to a region have been measured by "main overnight destination," ignoring visitors who make a day trip during their stay to a part of the Island that is not the "main overnight destination." This year, a question was added to the follow-up telephone survey that would provide some measure of day trip patterns. Exhibit 10 is a summary of the percent of pleasure and business PMV and air visitors who are estimated to have visited selected tourism regions on day trips in 2000.

Pleasure and Business PMV and Air - 2000 Estimate of Day Trip Visitations from Visitors Overnighting Outside Region		
	% of All Visitors	**Number of Visitors (000)**
West Prince/Evangeline	25.7	291.7
Summerside	39.5	448.3
South Shore	36.6	415.4
North Shore	41.3	471.0
Charlottetown	45.7	518.7
Eastern Kings	28.1	318.9
Southern Kings	38.6	438.1

Exhibit 10

Visitor satisfaction questions were introduced in the follow-up telephone survey in 1999 and these questions were continued in 2000 (Exhibits 11 and 12). In 2000, the number of visitors whose experience exceeded their expectations increased to 42% from 39% in 1999. In terms of overall satisfaction, the numbers between 1999 and 2000 were very similar with approximately 70% reporting that they were "very" satisfied with their visit. Overall, visitors to Prince Edward Island continue to rate their visit very highly.

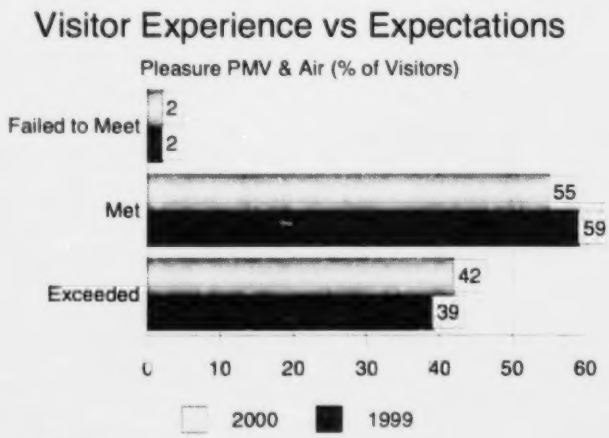


Exhibit 11

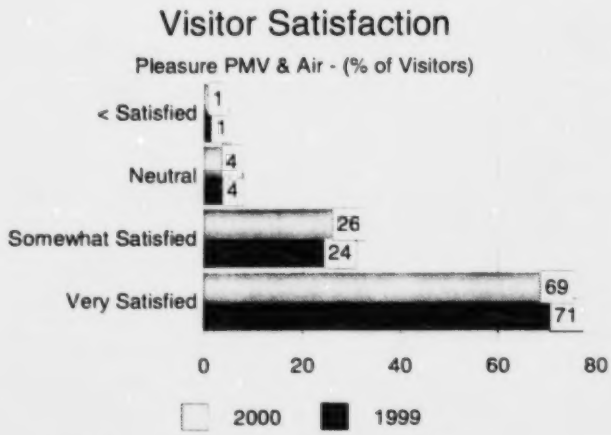


Exhibit 12

Finally, Exhibit 13 on the next page summarizes visitations to Prince Edward Island between May 15 and October 31, 2000. A total of 18 cruise ships visiting Charlottetown in 2000 with an estimated 9,584 passengers are not included in this summary due to a lack of comprehensive research data. For estimation purposes, the Atlantic Canada Cruise Association currently uses an expenditure factor of $110 per passenger which reflects port fees and direct spending by both passengers and crew.

Visitation and Expenditure Estimates: May 15 - October 31, 2000										
Segment	**% Visitors**		**Number of Visitors**		**Mean Travel Party Size**		**Number of Travel Parties**		**Total Expenditures ($ Million)**	
	2000	**1999**	**2000**	**1999**	**2000**	**1999**	**2000**	**1999**	**2000**	**1999**
Pleasure PMV & Air										
Newfoundland	3.0	3.0	32,560	35,426	3.7	3.7	8,800	9,575	$11.2	$9.3
Nova Scotia	19.5	20.5	211,902	239,596	3.5	3.4	60,543	70,469	$33.4	$42.2
New Brunswick	11.9	10.4	128,936	121,330	3.3	3.6	39,072	33,703	$20.0	$19.2
Quebec	7.1	8.6	77,087	99,959	3.0	2.9	25,696	34,469	$20.1	$24.1
Ontario	25.0	26.2	271,390	306,542	3.0	2.9	90,463	105,704	$70.8	$77.1
Other Canada	7.8	6.9	84,479	80,427	3.0	2.8	28,160	28,724	$20.2	$19.3
New England states	9.4	7.5	102,079	87,742	2.9	2.9	25,300	30,256	$27.4	$24.7
Mid Atlantic states	5.9	4.3	64,204	50,669	3.2	2.7	20,064	18,766	$18.5	$14.9
Other U.S.A.	8.3	9.9	90,287	115,508	2.7	2.9	33,440	39,831	$27.3	$27.5
International	2.3	2.7	24,499	31,022	2.4	2.7	10,208	11,490	$8.2	$8.3
Total Pleasure PMV & Air	92.2	92.0	1,087,424	1,168,221	3.1	3.1	351,645	382,987	$257.0	$266.6
Motorcoach	3.8	3.1	44,394	39,262	2.1	2.0	21,140	19,631	$23.0	$16.7
Business PMV & Air	4.0	4.9	47,525	62,641	1.8	2.2	25,679	28,473	$21.1	$19.2
Total	100	100	1,179,343	1,271,124	3.0	2.9	398,464	431,005	$301.1	$302.6

Exhibit 13

2. Methodology

Tourism PEI's annual visitor and expenditure analysis is based on data collected through:
1) exit point intercepts;
2) follow-up telephone interviews;
3) on-Island, in-person motorcoach surveys; and
4) on-Island, self-completed Japanese surveys.

1. Exit Point Intercepts
From June through September, interviewers were stationed at the ferry, bridge and airport. One airport interviewer was stationed during daytime hours for departing flights. At the ferry, one interviewer was stationed during daytime hours on a 3-day-on, 2-day-off rotation. At the bridge, an attempt was made to station one interviewer during daytime hours seven days a week, and to add a second interviewer for weekends during July and August and during anticipated periods of heavy traffic times throughout the survey period.

At each exit point, interviewers attempted to intercept every fourth departing airport passenger or non-commercial vehicle. When the intercept was made, the interviewer first determined the contact's place of residence. Non-resident contacts were then asked the primary reason for their visit – pleasure or business – and an attempt was made to recruit the contact for a follow-up telephone interview. If the recruitment was successful, the interviewer then collected information required for contacting the individual.

The database of intercepts collected is used to determine resident/non-resident ratios, business/pleasure splits, and visitor origin party market share. In 2000, a total of 7,286 resident and 18,988 non-resident intercepts were made. From these non-resident intercepts, 12,552 or 66.1% agreed to participate in a follow-up telephone interview.

While the intercept methodology is sound, there are operational limitations:
a) the intercept period is restricted to the June to September period;
b) intercepts are restricted to daytime hours;
c) the weekly intercept periods vary from year to year at the ferry and bridge;
d) during severe weather conditions, bridge and ferry intercepts are suspended; and
e) due to interviewer safety considerations, the opening or closing of traffic lanes at the bridge results in situations where lanes of traffic may be excluded from interception.

In 2000, intercept staff at the bridge also reported a number of cases where vehicles changed toll lanes on their approach in an apparent move to avoid the lane with the interviewer.

2. Follow-Up Telephone Interviews

Follow-up telephone interviews were conducted among names randomly selected from the database of intercepts who agreed to be interviewed. North American interviews had a target completion window of 10 days from date of intercept, while attempts were made to complete international interviews within 30 days of intercept.

Interviews were stratified based on season – early shoulder, peak and late shoulder – pleasure/business, and visitor origin market for pleasure. An allocation of the sample to individual strata was done in order to ensure that reliable data was available for each visitor origin market which represents 5% or more of visitors. These markets – Nova Scotia, New Brunswick, Quebec, Ontario, Other Canada, New England, Mid-Atlantic and Other U.S.A. – were each allocated a sample of 260. Two smaller visitor origin markets – Newfoundland and International – were each allocated a sample of 140. Business visitors were allocated a sample of 300.

To enhance data collection accuracy, telephone interviews were completed with the use of computer-aided telephone interview (CATI) software, and a 10% verification call-back process was followed.

In 2000, a total of 2,523 telephone interviews were completed as follows:

Business:		298
Pleasure:	Newfoundland:	127
	Nova Scotia:	242
	New Brunswick:	236
	Quebec:	229
	Ontario:	268
	Other Canada:	250
	New England:	270
	Mid Atlantic:	267
	Other USA:	263
	International:	73

3. Motorcoach Surveys

Between June and October, departing motorcoach visitors were intercepted at their hotel/motel and asked to complete a visitor questionnaire. A quota of five passengers per motorcoach surveyed was established to minimize bias. The accommodations were randomly selected from known motorcoach accommodations in the greater Charlottetown area. Survey days were randomly selected, but the sample was quota-based over the shoulder and peak periods. For 2000, 301 motorcoach questionnaires were completed.

In support of the motorcoach visitor survey, a survey of motorcoach accommodation operators was conducted by Tourism PEI to establish an estimate of the number of motorcoach visitors.

4. Japanese Surveys

Japanese language visitor questionnaires were distributed by Charlottetown-based Prince Edward Tours to their Japanese clients between June and October. These questionnaires were self-completed and 314 questionnaires were obtained in 2000. Sampling was quota-based over the shoulder and peak periods.

In support of the Japanese visitor survey, a telephone survey of known Japanese accommodation operators in PEI was conducted to establish an estimate of the total number of Japanese visitors.

Traffic Data and Analysis

Traffic data were obtained from the airport, bridge and ferry operating authorities. At the airport , passenger counts were provided, while non-commercial vehicle counts were provided by the bridge and ferry operators. Resident/non-resident splits, visitor origin ratios and average vehicle occupant and air party counts were then used to establish an estimate of the number of visitors.

Survey data collected were analyzed using spreadsheet software and SPSS and Rayosoft statistical software. The data were proofed and corrected for non-sampling errors, and distributions were screened and adjusted for extreme values where appropriate using standard analytical processes. Pleasure visitor telephone survey data have been weighted by visitor origin for frequency counts and economic impact.

Section 17 reports summary estimates and descriptive statistics covering visitations, visitor profiles and visitor expenditures for 11 Prince Edward Island tourism regions. Due to the small sample sizes and resulting wide margins of error for most regions, readers should use this information with caution. Where possible, examining a three or four year trend may provide more useful insights into regional activity.

3. Pleasure PMV & Air: Visitor Profile

In 2000, an estimated 1.09-million pleasure visitors to Prince Edward Island travelling via private motor vehicle or air accounted for an estimated 92.2% of all visitors during the May to October period. This share of market is the same as 1999.

Share of market held by repeat visitors increased for the third consecutive year in 2000, reaching a level last experienced in 1995 (Exhibit 14).

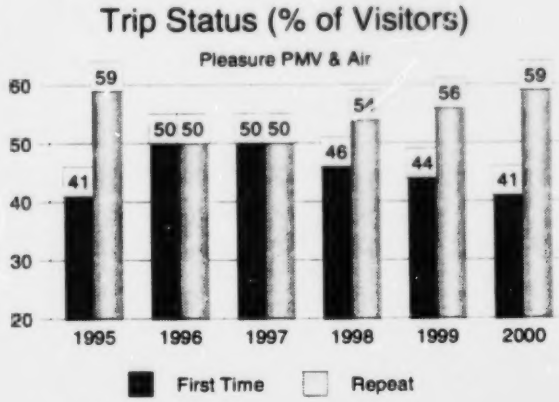


Exhibit 14

Distinct changes in repeat versus first time visitors were noted in several visitor origin regions (Exhibit 15).

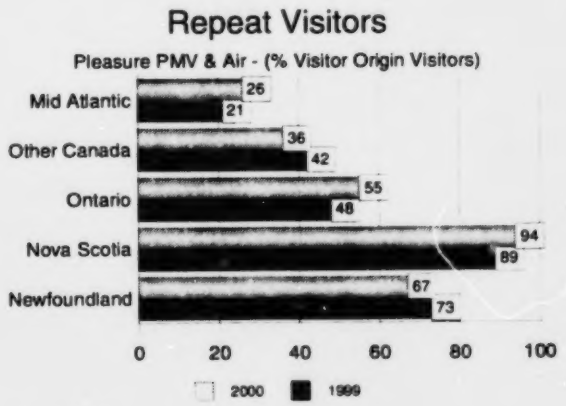


Exhibit 15

A pleasure vacation (48%), visiting friends and relatives (17%), and "just to see and visit PEI" (13%) where key travel motivators for pleasure visitors in 2000. As in past years, almost half the pleasure parties made their decision to come more than 12 weeks in advance of departure (Exhibit 16).

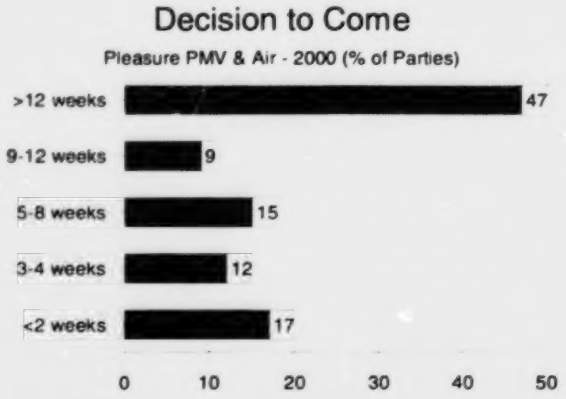


Exhibit 16

With 45% market share, single adult couples represent the largest party type in 2000, followed by single families with children under 18 (30%) and groups (20%) (Exhibit 17). Party type by visitor origin is illustrated in Exhibit 18 on the next page.

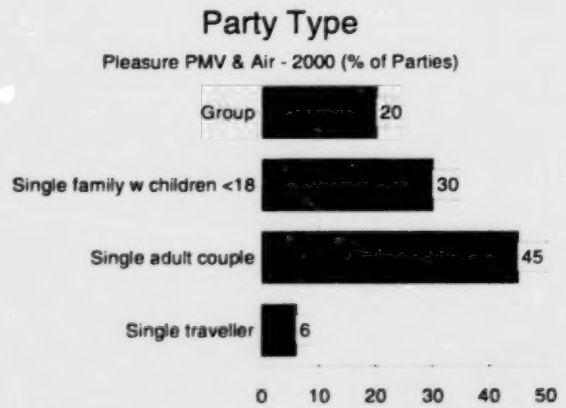


Exhibit 17

Average party size remained the same in 2000 at 3.1 persons, and this has been consistent for the past several years (Exhibit 19).

	Party Type - Pleasure PMV & Air - 2000 (% of Parties)			
	Single Traveller	Single Adult Couple	Family with Children <18	Group of Friends/Adults
Newfoundland	2	27	41	30
Nova Scotia	5	31	42	22
New Brunswick	4	35	43	19
Quebec	6	48	31	16
Ontario	7	48	28	18
Other Canada	6	44	27	23
New England	8	47	26	19
Mid Atlantic	4	50	24	22
Other U.S.A.	7	57	16	20
International	3	74	6	17

Exhibit 18

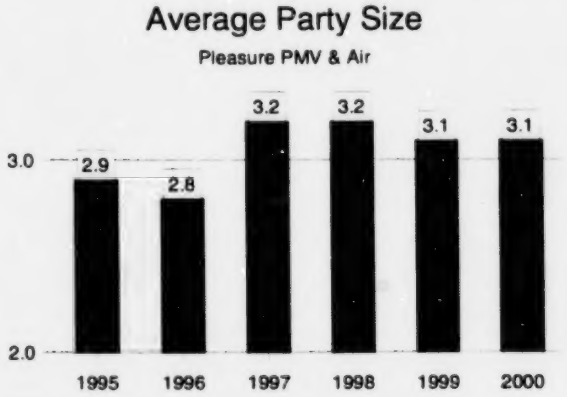
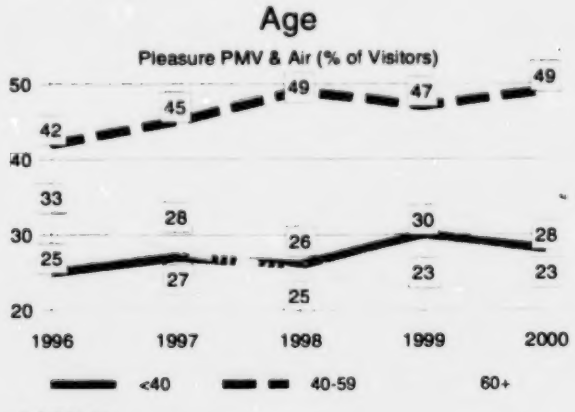


Exhibit 19

After several years of declining market share, the aged 60+ segment levelled off in 2000 at 23% of visitors. The <40 age group declined slightly to 28% of visitors, while the 40 to 50 age group increased slightly to 49% (Exhibit 20).



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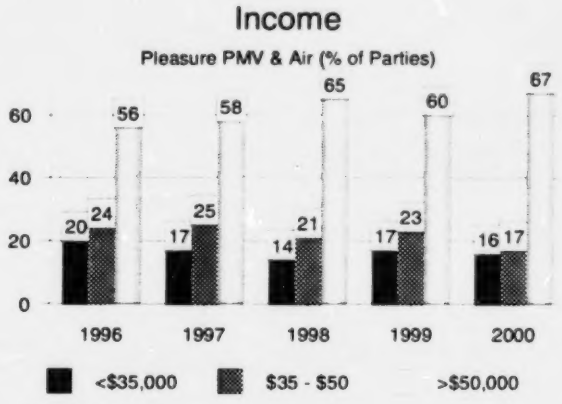


Exhibit 21

While visiting PEI, the 2000 survey of pleasure PMV and air visitors indicates that hotels, motels and resorts continued to be the most popular type of accommodation (Exhibit 22). The 3% decline in parties staying at friends and relatives is good economic news in that a larger share of the market in 2000 were staying in paid accommodations.

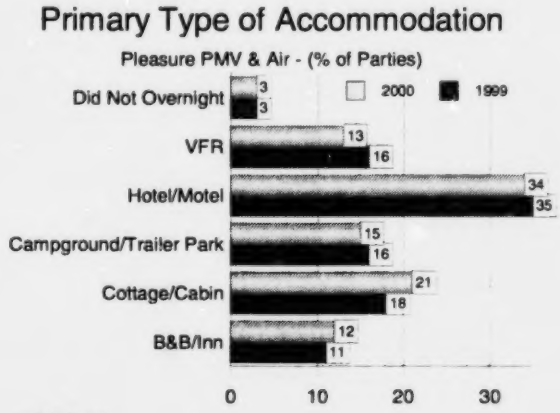


Exhibit 22

In 2000, it is estimated that average length of stay among pleasure PMV and air visitors was 4.1 days. While this is a shorter length of stay than in 1999, it is in line with average lengths of stay since 1996 (Exhibit 23). PEI's share of total trip nights declined slightly in 2000 to 40% from 42% in 1999.

During their stay in Prince Edward Island in 2000, the top five activities experienced by pleasure PMV and air visitors were:

1. sightseeing (79% vs 81% in 1999);
2. craft shopping (75% vs 73% in 1999);
3. beach visits (71% vs 72% in 1999);
4. general shopping (56% vs 53% in 1999); and

5. visiting PEI's National Park (50% vs 52% in 1999).
All activities are summarized in Exhibit 24 below.

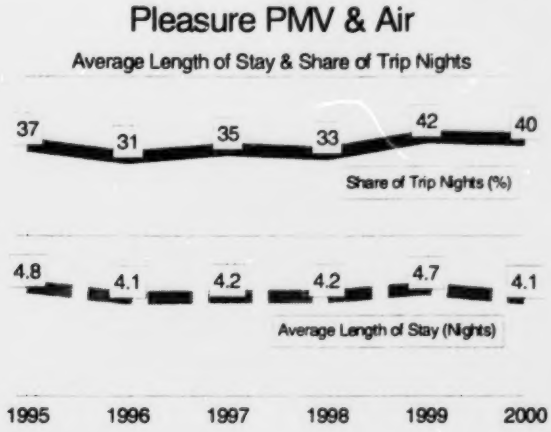


Exhibit 23

Exhibit 24

	Pleasure PMV & Air – Visitor Activities			
	1997	**1998**	**1999**	**2000**
Acadian Culture	28%	20%	29%	22%
Anne/Lucy Maud	47%	50%	43%	39%
Beach Visits	69%	74%	72%	71%
Camping	20%	20%	19%	18%
Craft Shopping	77%	85%	73%	75%
Festivals/Events	13%	17%	24%	29%
Fun/Theme Parks	19%	26%	24%	23%
Golf	12%	12%	13%	17%
History/Culture	46%	47%	44%	40%
Live Theatre	15%	13%	18%	18%
Lobster Suppers	46%	48%	45%	42%
National Park	43%	69%	52%	50%
Soft Outdoor Adventure(1)	20%	16%	45%	47%
Sightseeing	88%	93%	81%	79%
General Shopping	44%	52%	53%	56%

1) Includes bird watching, boating, Confederation Trail, cycling, fishing and hiking

Historically, visitations to a region have been measured by "main overnight destination," ignoring visitors who make a day trip during their stay to a part of the Island that is not the "main overnight destination." In 2000, a question

was added to the follow-up telephone survey that would provide some measure of day trip patterns. Exhibit 25 is a summary estimate of visits by pleasure PMV and air visitors to selected tourism regions trips in 2000.

Pleasure PMV and Air - 2000 Estimate of Day Trip Visitations from Visitors Overnighting Outside Region		
	%of All Pleasure Visitors	Number of Visitors (000)
West Prince/Evangeline	27.3	296.9
Summerside	42.2	456.7
South Shore	38.5	418.7
North Shore	42.3	460.0
Charlottetown	49.5	538.3
Eastern Kings	29.5	320.8
Southern Kings	41.3	449.1

Exhibit 25

For the 2000 season, it is estimated that pleasure PMV and air visitors spent $257-million on goods and services while in-province (Exhibit 26).

In terms of where visitors spent money in 2000, accommodations (33% vs 31% in 1999) and restaurant/take-out meals (23% vs 24% in 1999) continued to account for more than half of all expenditures (Exhibit 27).

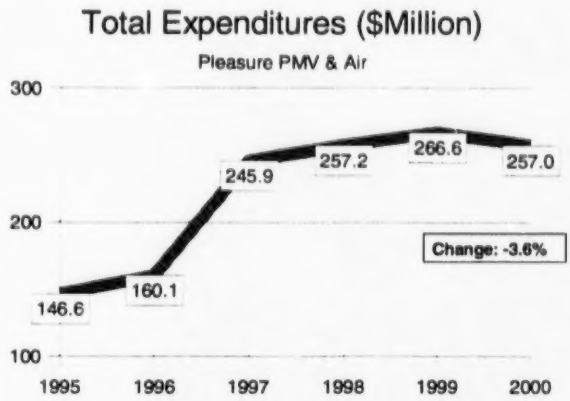


Exhibit 26

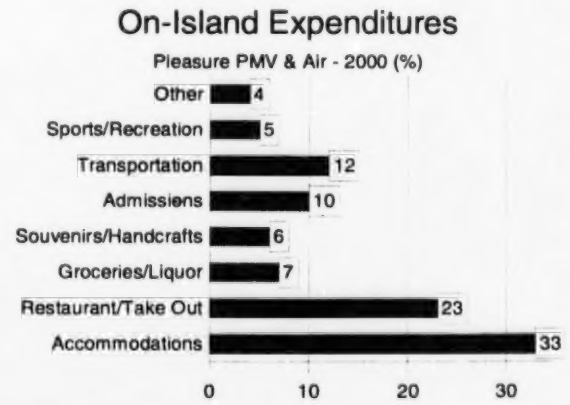
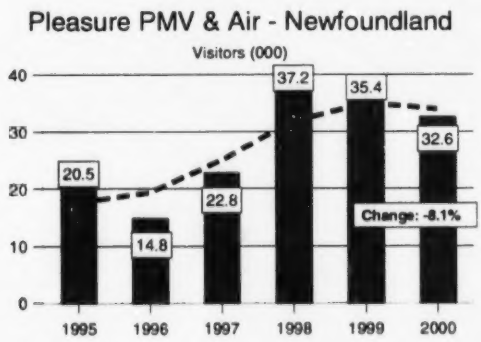


Exhibit 27

4. Newfoundland

Prince Edward Island continued to experience a settling in both the number of pleasure visitors and parties from Newfoundland. While total expenditures increased sharply in 2000, this may be due to year-to-year sampling variations as the dotted trend line suggests (Exhibit 30). Notable demographic changes can be seen in age, family income and work status (Exhibits 35-37). In addition, average length of stay continued a downward trend (Exhibit 38).



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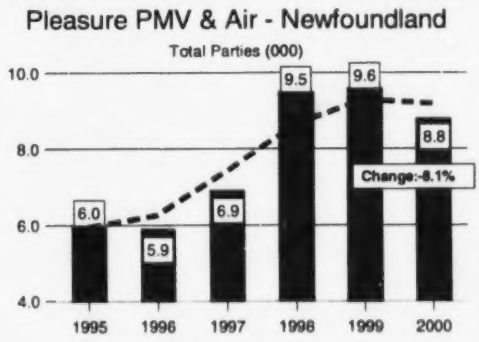

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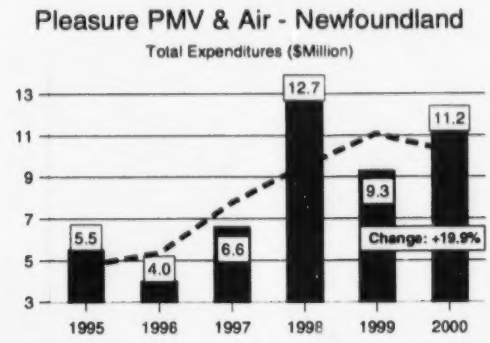

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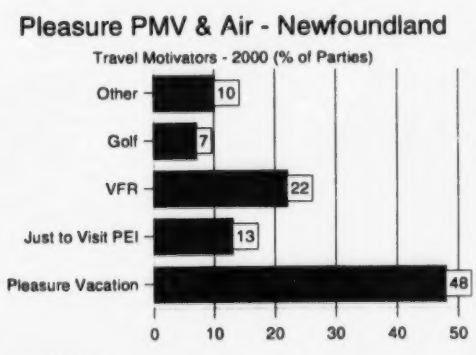

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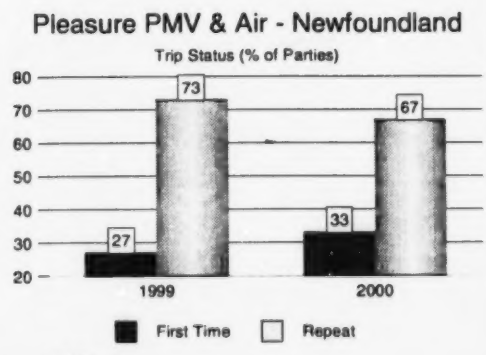

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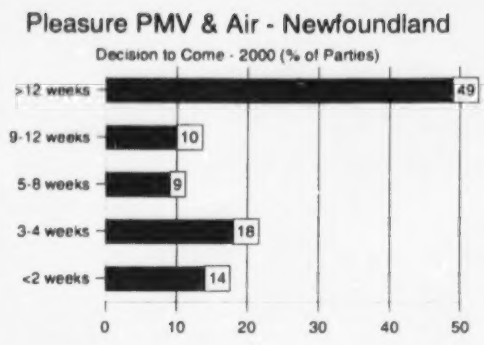

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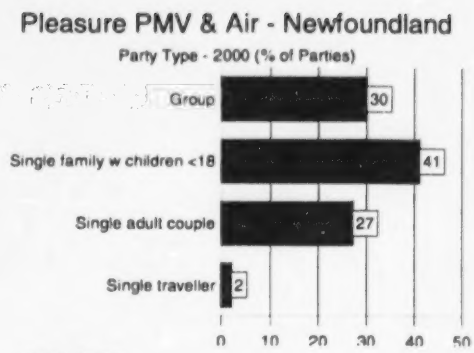

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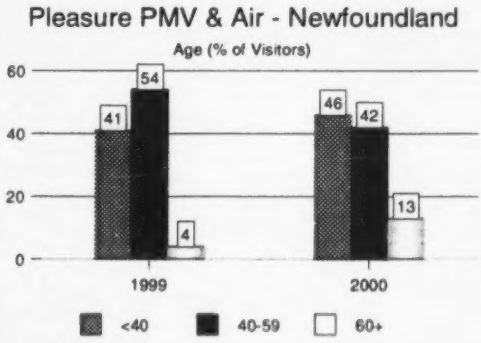

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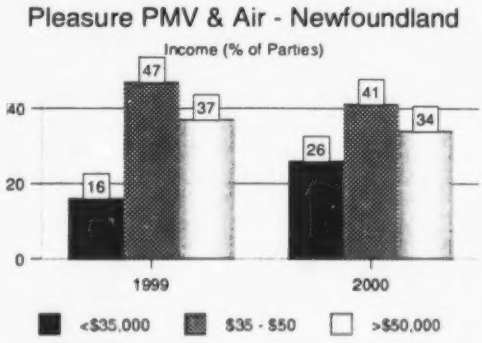

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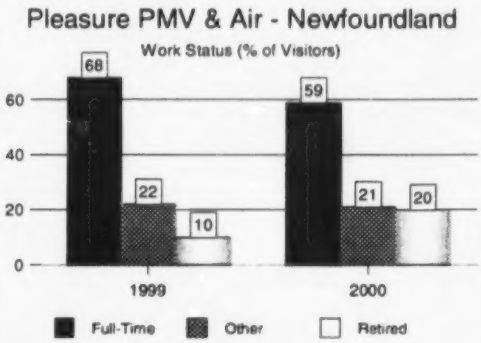

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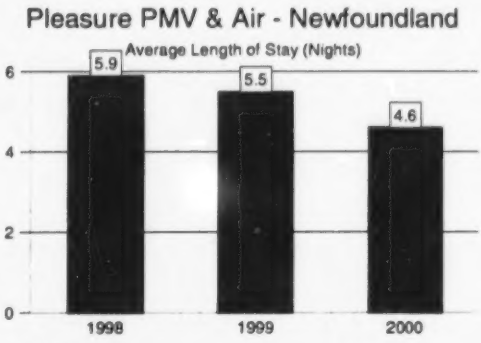

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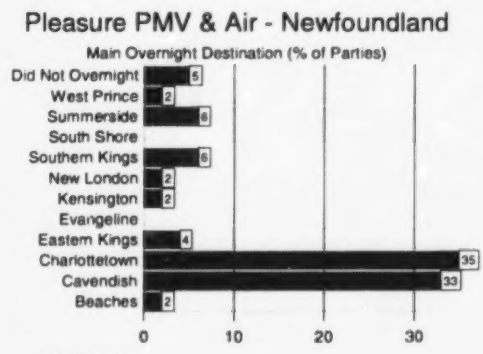

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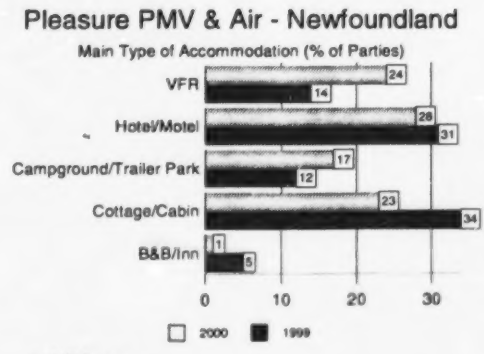
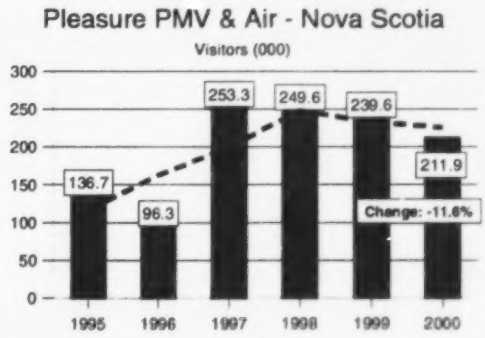


Exhibit 40

5. Nova Scotia

Visitations from Nova Scotia appear to have been heavily affected in 2000 by weather and the Tall Ships celebrations. Notable demographic changes in 2000 include age (Exhibit 48) and family income (Exhibit 49), resulting in an increase in market share represented by older (40+) visitors with higher income. A 9% decrease in share held by non-paid accommodations is also notable.



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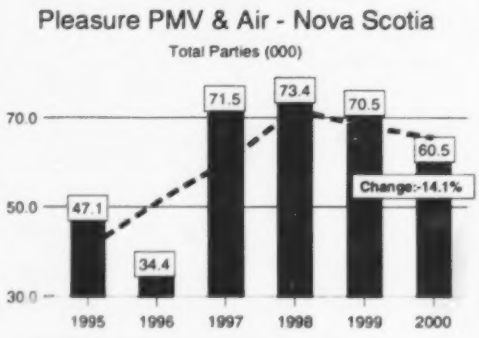

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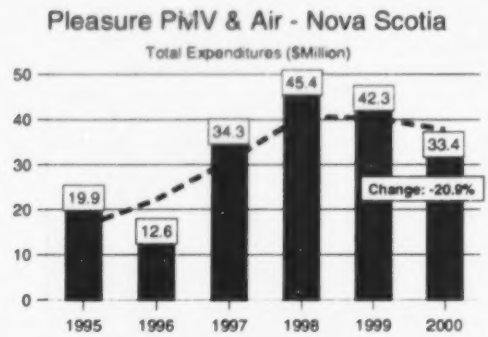

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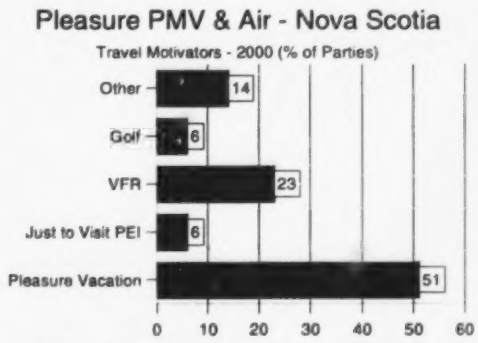

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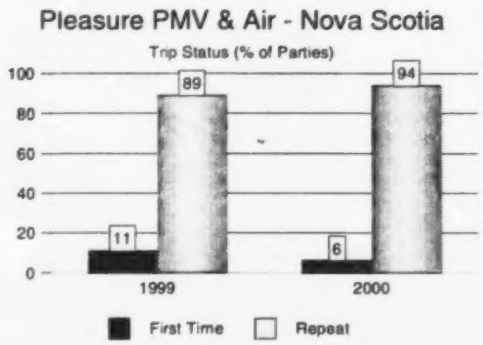

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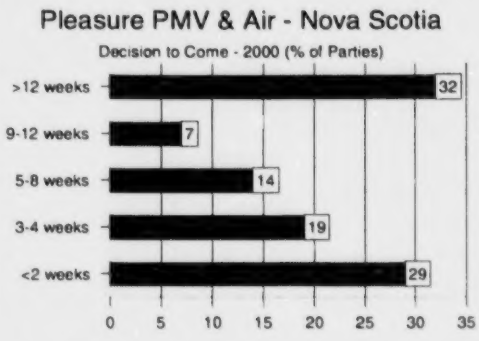

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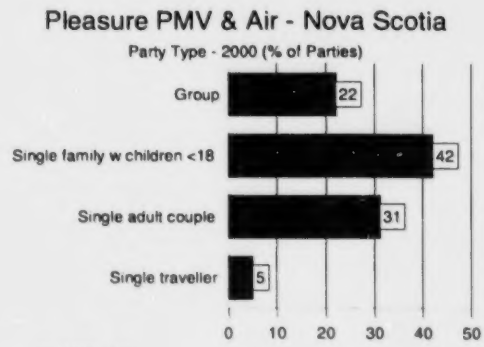

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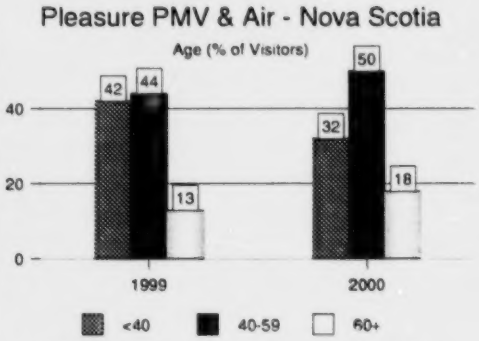

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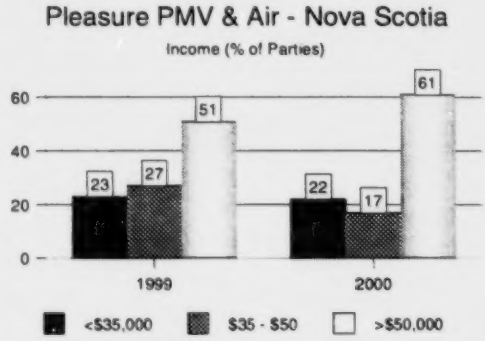

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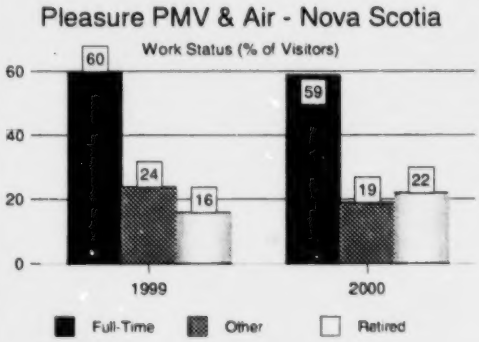

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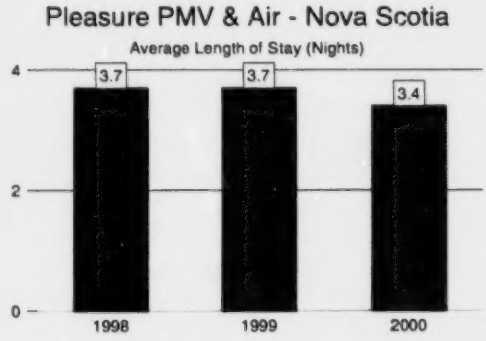

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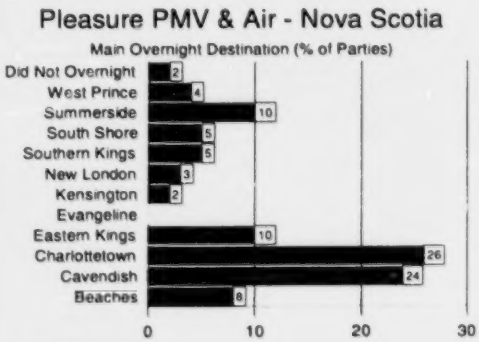

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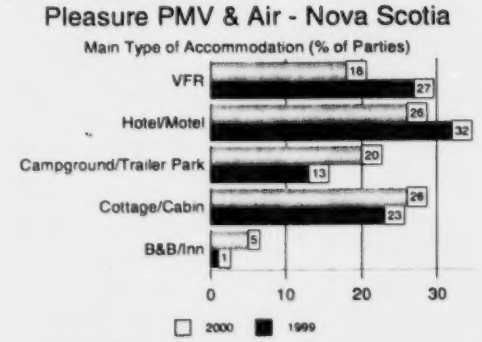
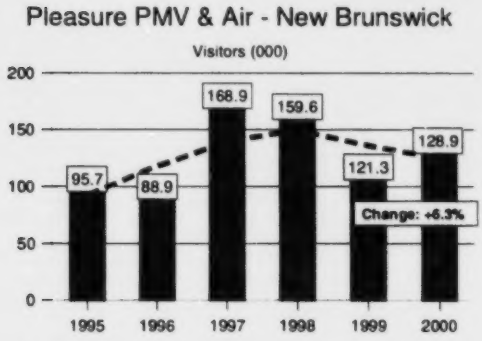


Exhibit 53

6. New Brunswick

Visitations from New Brunswick recovered somewhat from the decline in 1999. Notable changes in 2000 include a 6% increase in high income parties (Exhibit 62), a decline in average length of stay from 3.7 to 2.7 days (Exhibit 64), and a 4% decrease in the share of parties staying in non-paid accommodations (Exhibit 66).



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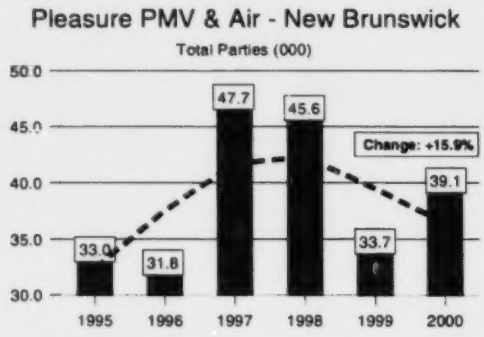

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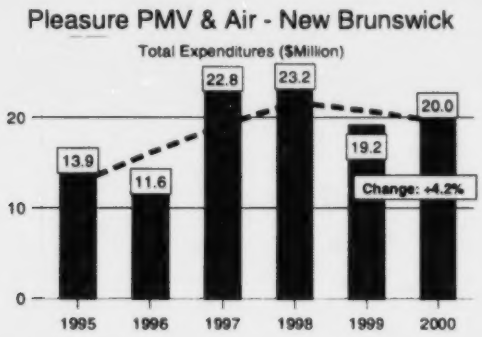

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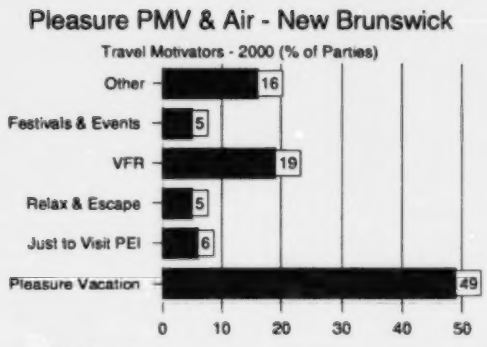

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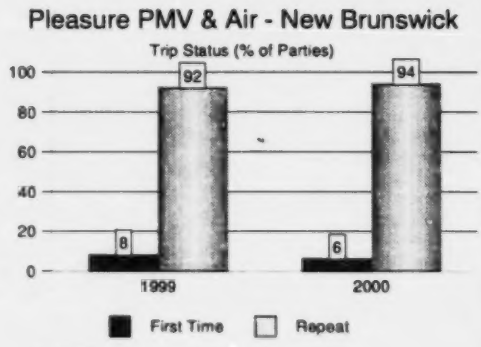

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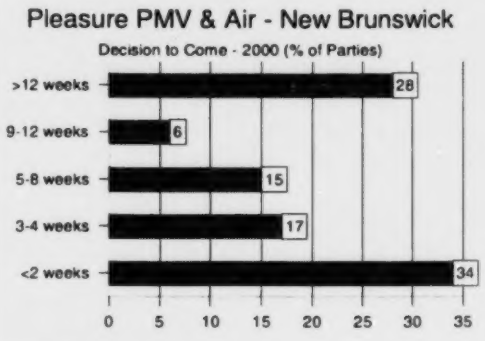

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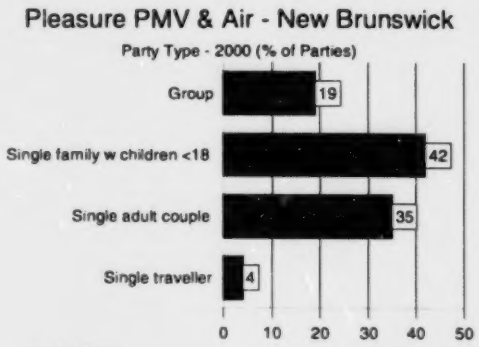

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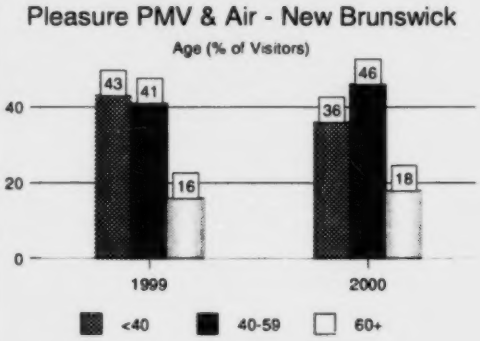

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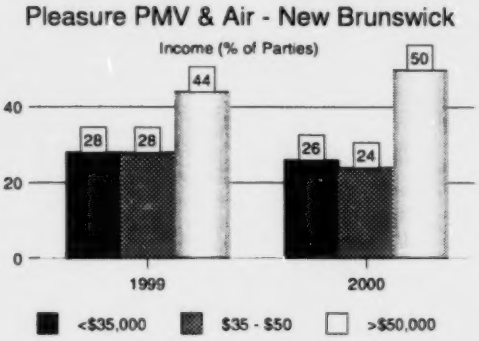

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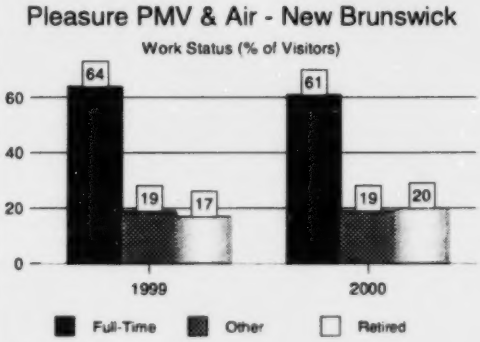

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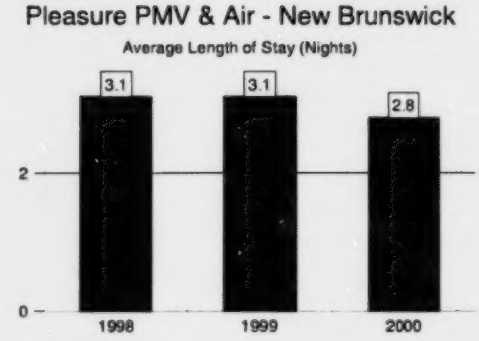

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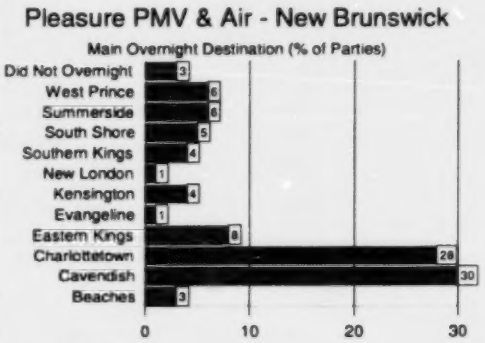

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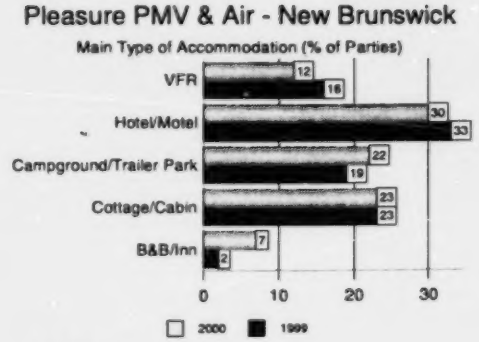
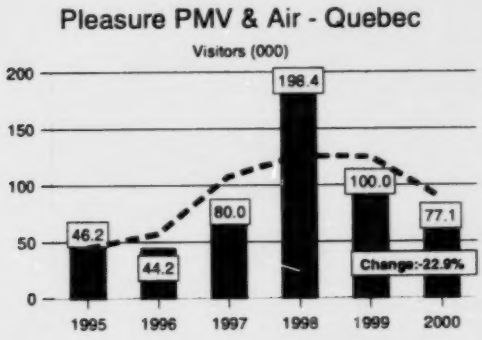


Exhibit 66

7. Quebec

An on-going stay-at-home campaign by the Quebec government, a continuing return to traditional vacation patterns, gasoline prices and weather are believed to be key factors behind a decline in visitations from Quebec in 2000. Demographic changes in age and party income (Exhibits 72-73), and a 13% decline in share held by trailer parks/campgrounds as the main type of accommodation (Exhibit 77) are notable for 2000.



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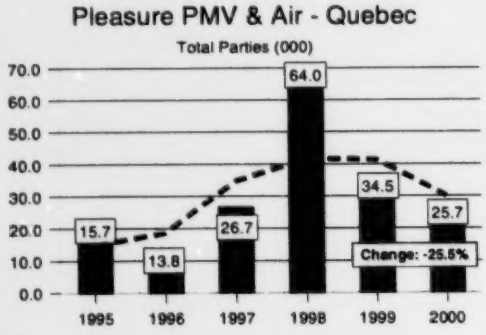

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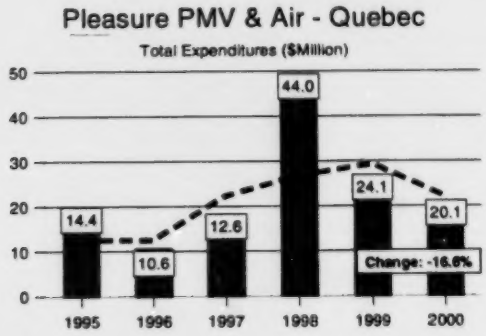

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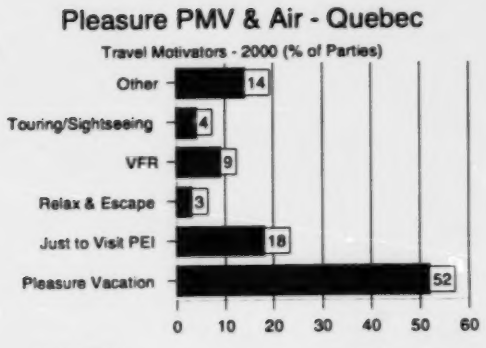

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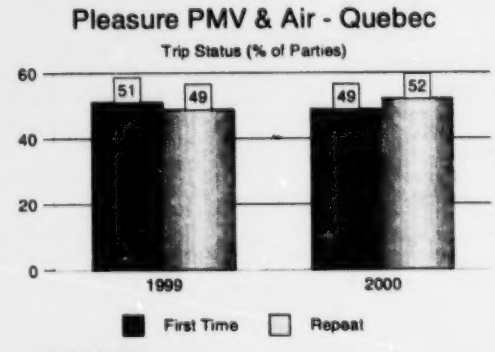

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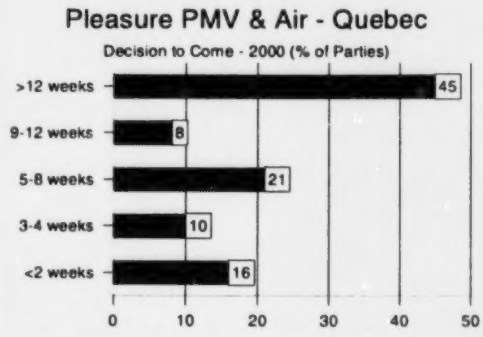
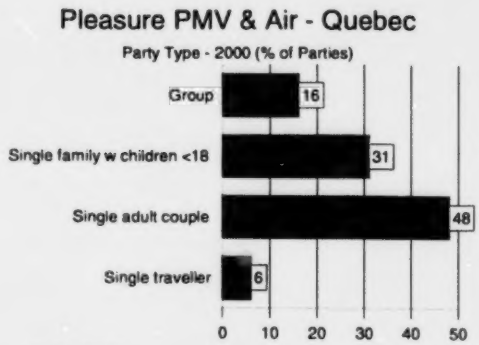


Exhibit 59



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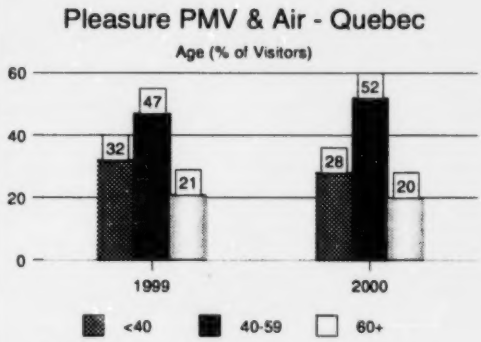

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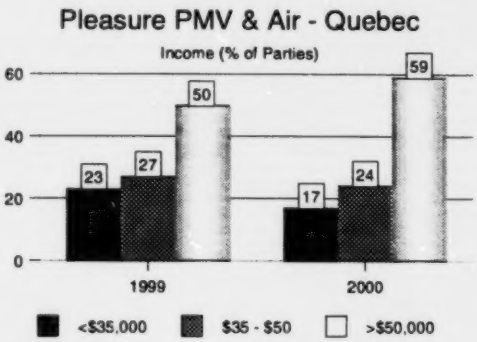

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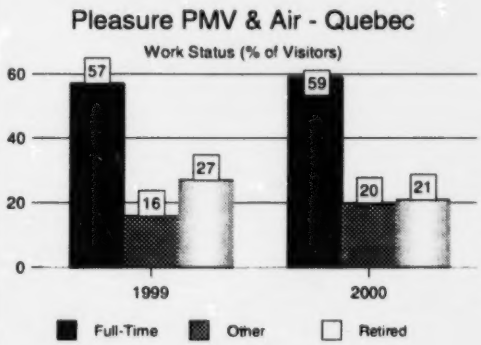

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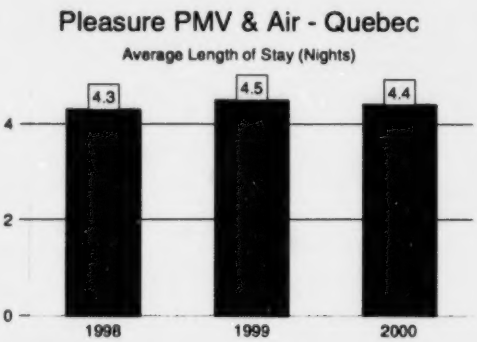

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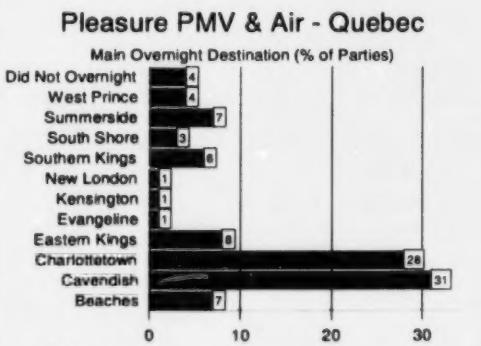

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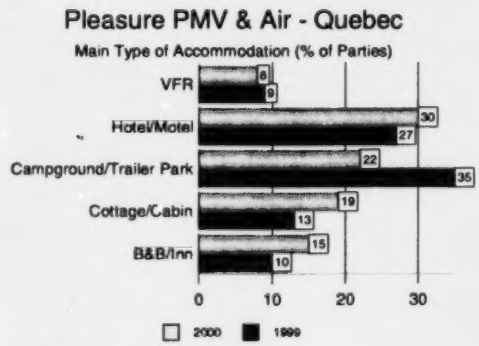
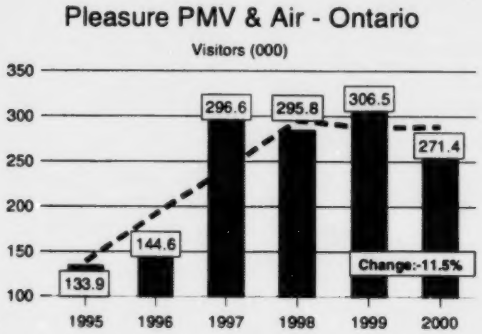


Exhibit 77

8. Ontario

With an estimated 25% share of market, Ontario continues to be the Island's largest visitor origin region. The visitor decline in 2000 may be attributed to gasoline prices and a much cooler summer season in Ontario. As with most regions, the shifts in age and income (Exhibits 85-86) as well as work status are notable in 2000. The 6% decline in share held by first time visitors and the shorter length of stay are also notable (Exhibits 82, 88).



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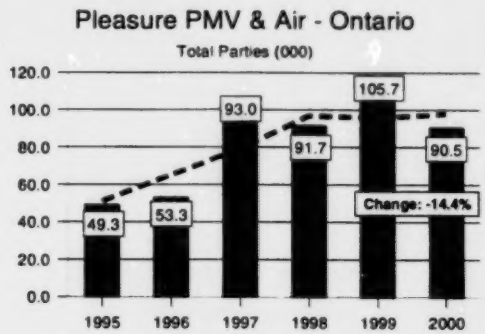

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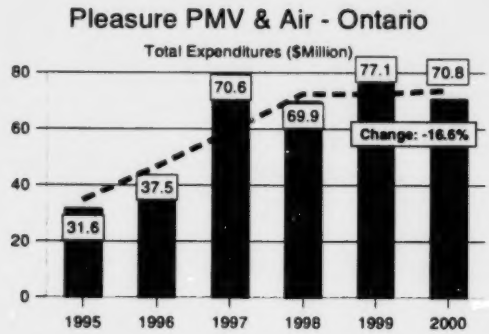

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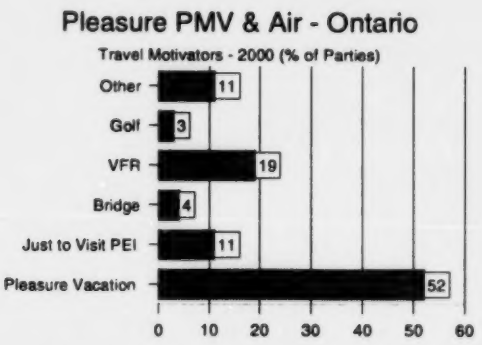

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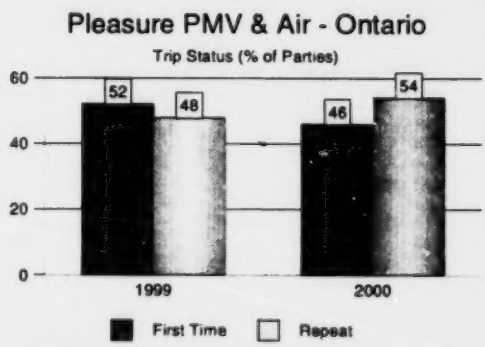

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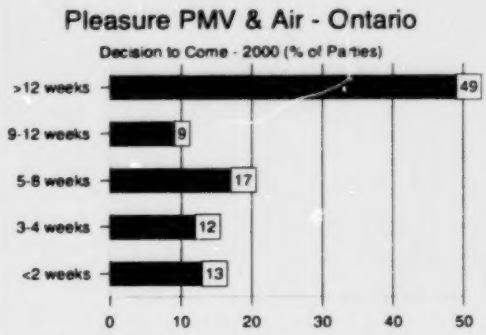

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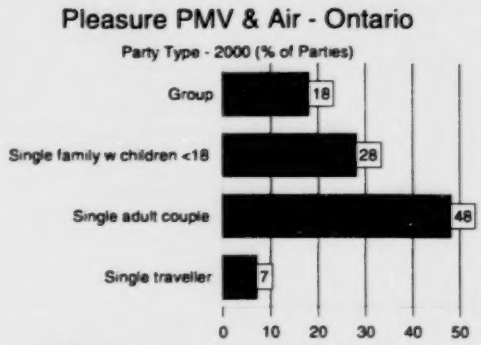

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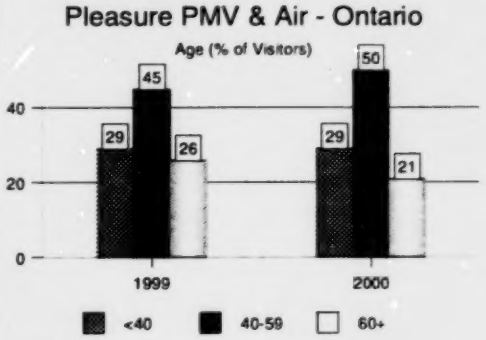

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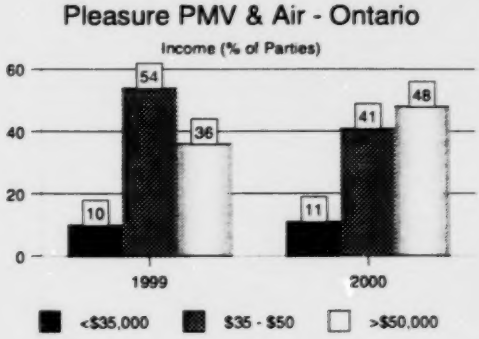

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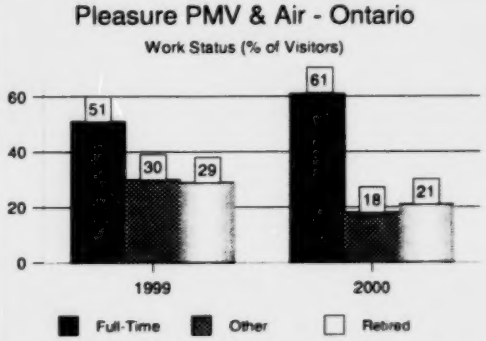

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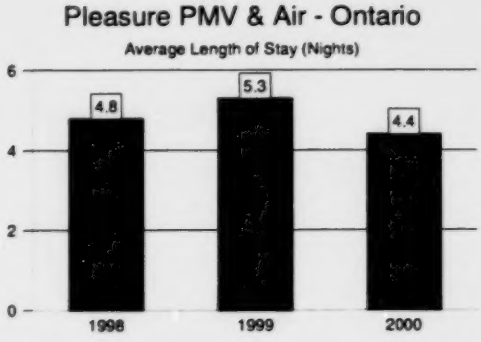

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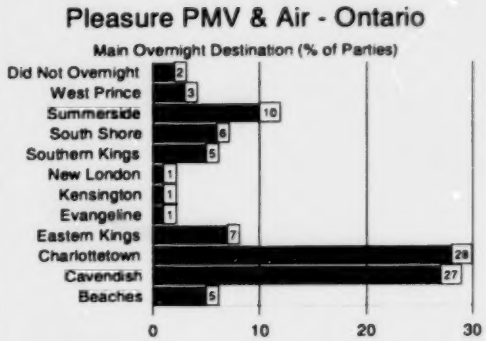

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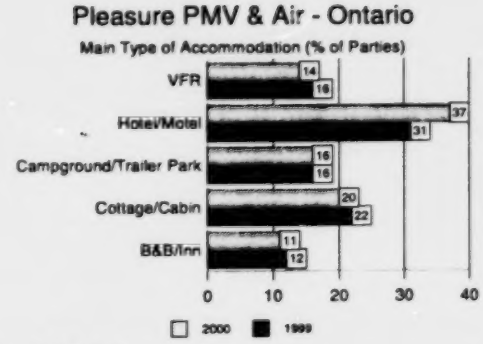
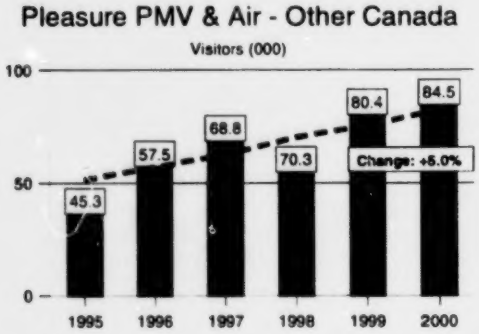


Exhibit 90

9. Other Canada

Prince Edward Island has benefited from a steady upward trend in visitations from "Other Canada" (west of Ontario) in the past five years (Exhibit 91). This trend continued in 2000 with a 5% increase in pleasure PMV and air visitors. For the 2000 season, the 12% increase in market share held by first time visitors is notable (Exhibit 95), as is the upward shift in family income (Exhibit 99).



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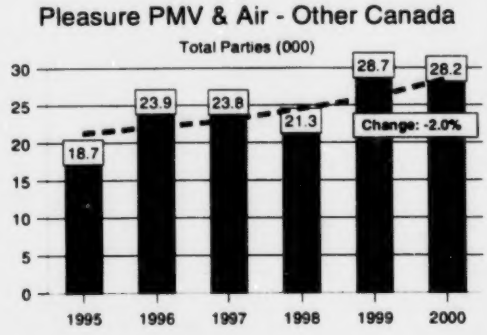

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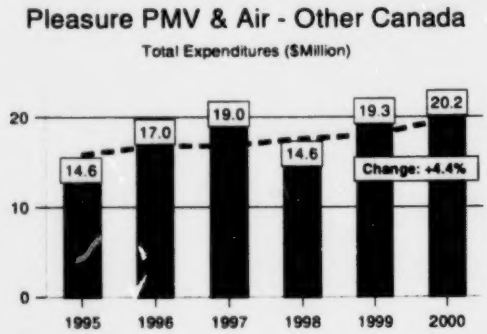

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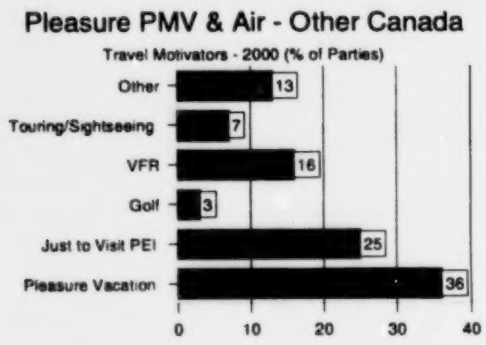

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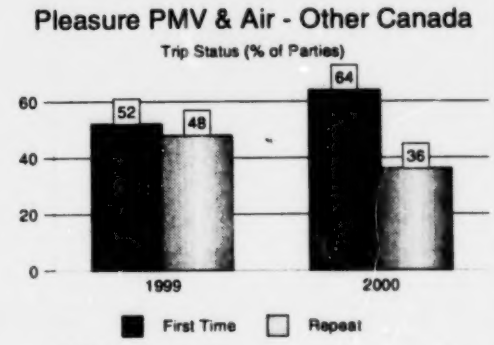

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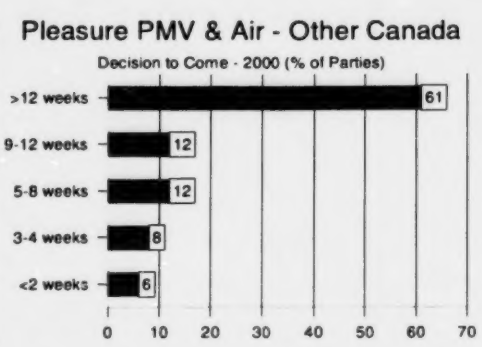

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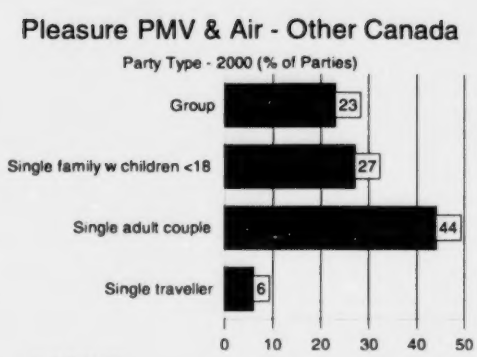

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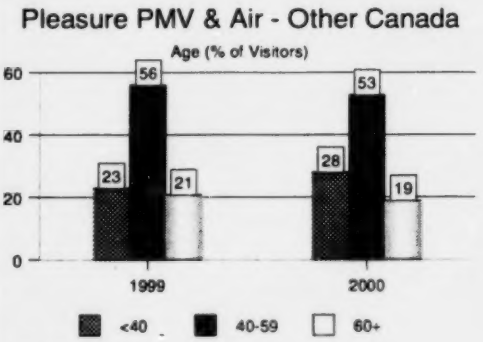

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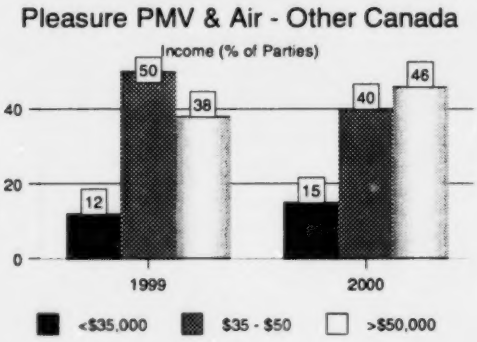

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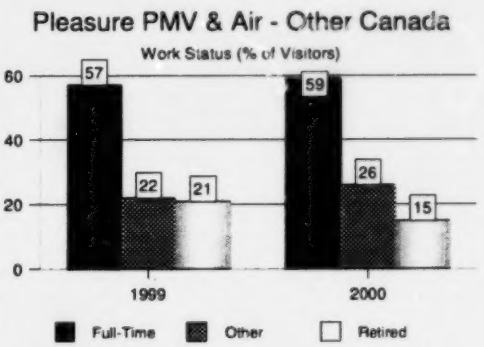

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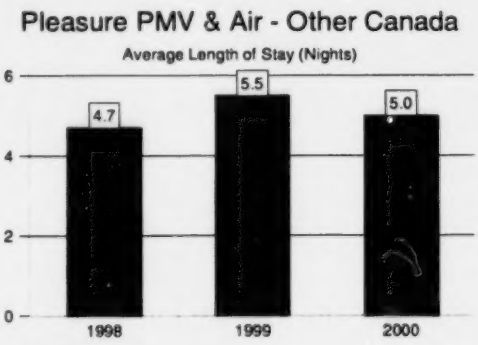

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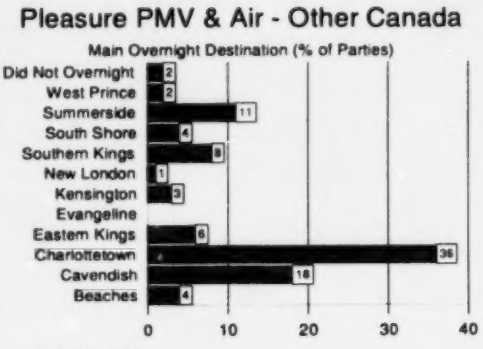

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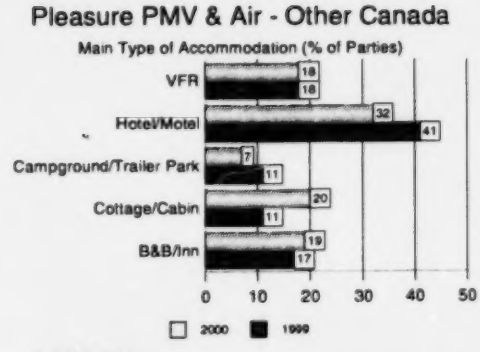
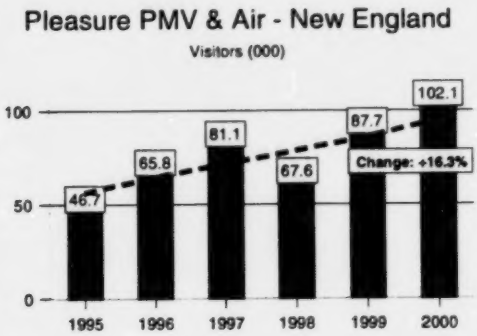


Exhibit 103

10. New England

Upward growth from the New England market continued in 2000. Much of this can be attributed to the strong U.S. economy, the purchasing power of the U.S. dollar, and increased awareness of Prince Edward Island through on-going marketing efforts. Notable changes in 2000 include a strong shift in family income (Exhibit 112) and the main type of accommodation mix (Exhibit 116).



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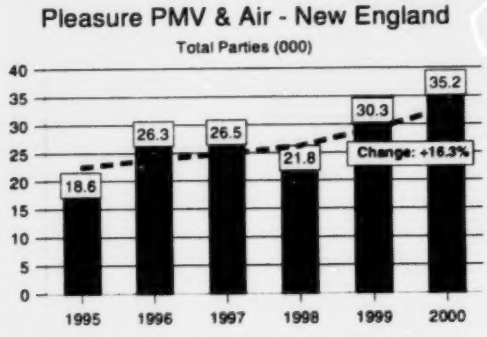

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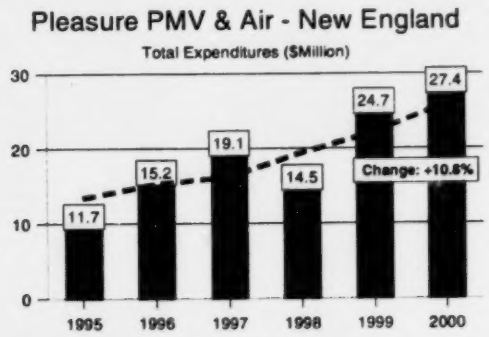

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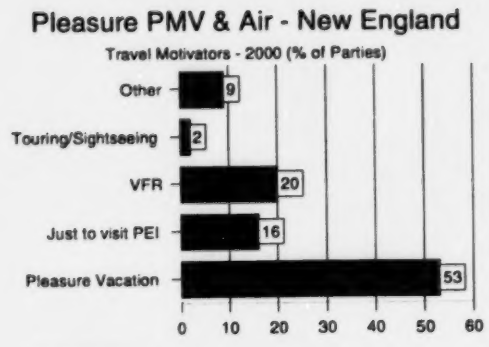

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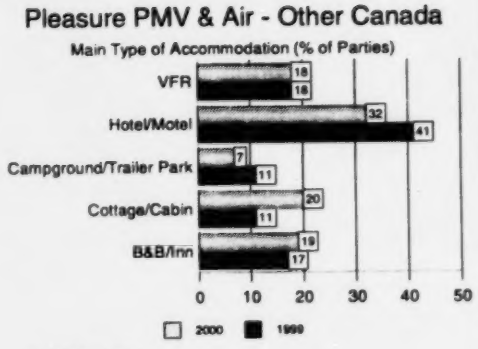

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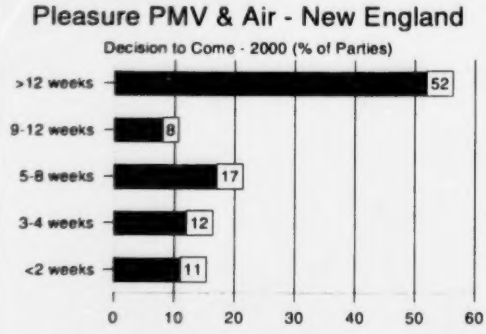

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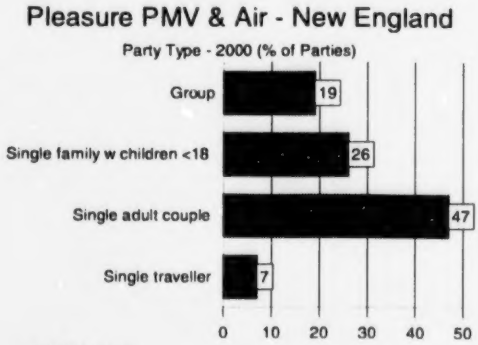

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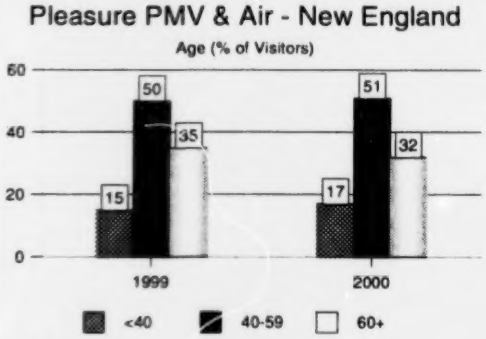

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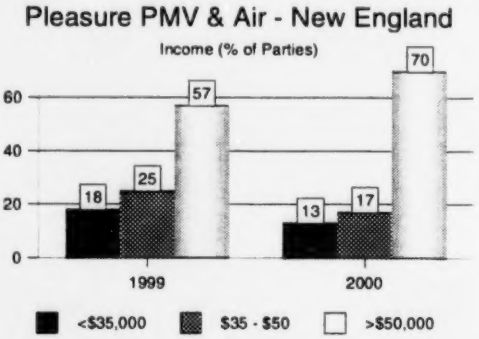

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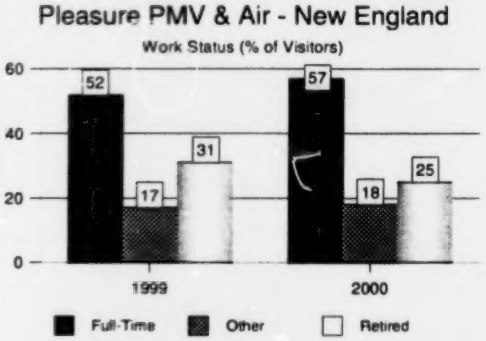

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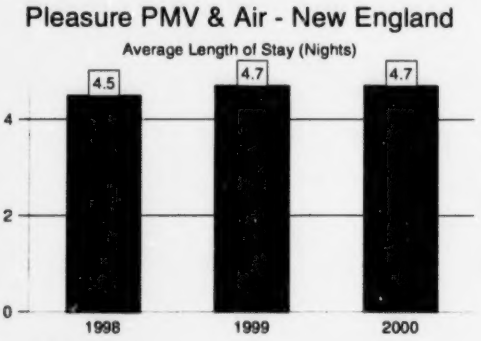

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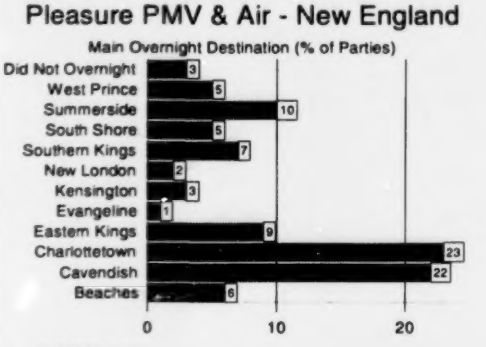

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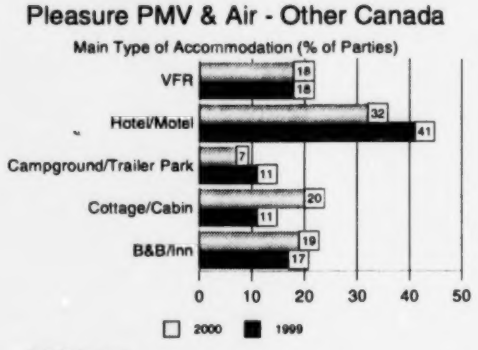
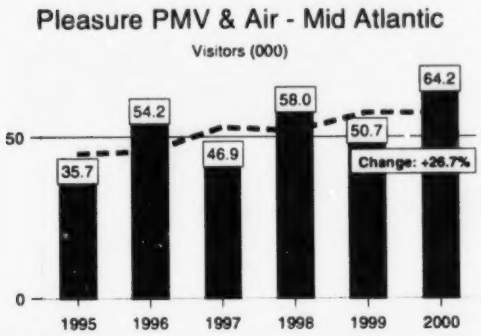


Exhibit 116

11. Mid Atlantic

The mid Atlantic region of the United States was the strongest performing visitor origin region in 2000 with a 26.7% increase in visitors. While year-to-year visitations have fluctuated, visitations in 2000 are up 18% over 1996 when the bridge opened. Notable for 2000 are a 5% increase in market share held by repeat visitors (Exhibit 121) and the upward trend in length of stay (Exhibit 127).



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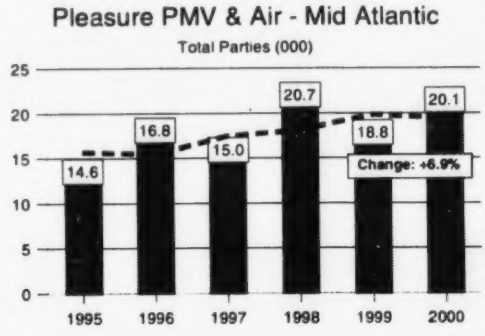

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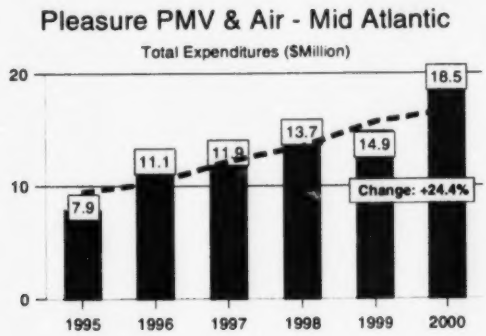

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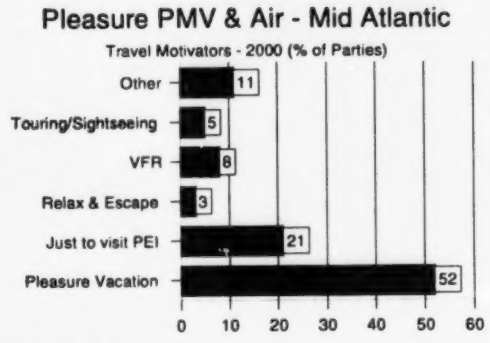

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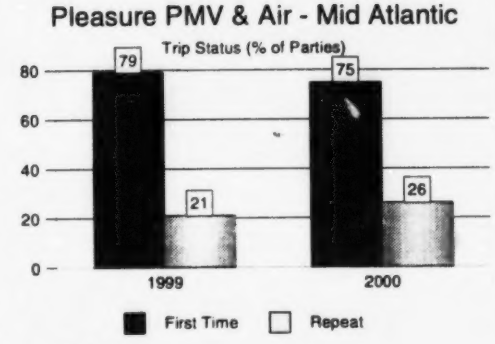
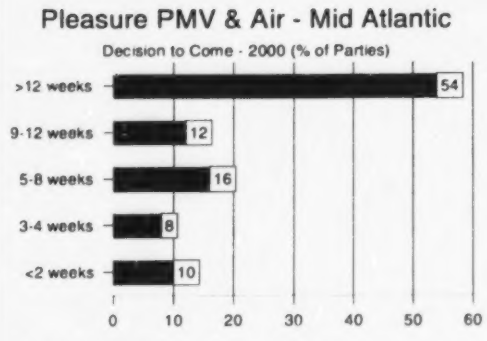


Exhibit 121



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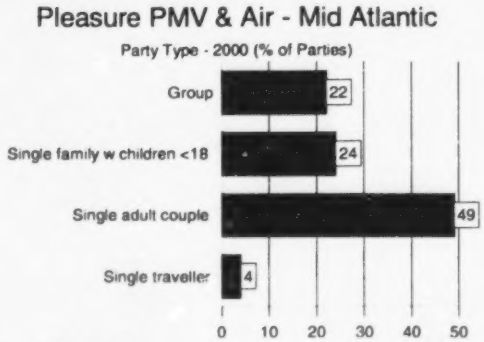

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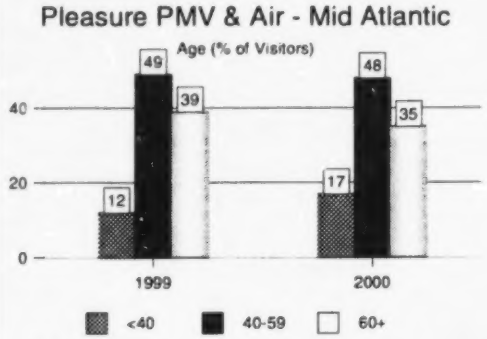

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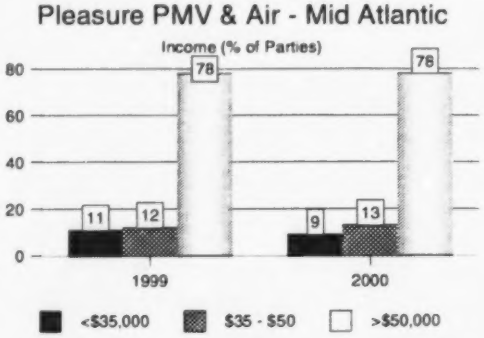

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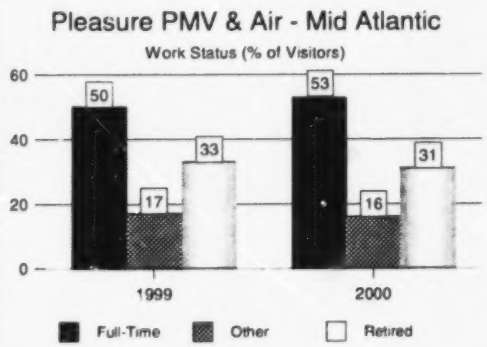

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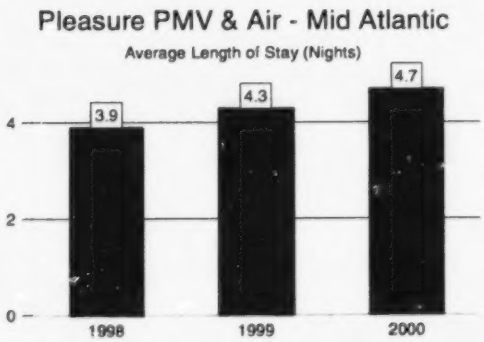

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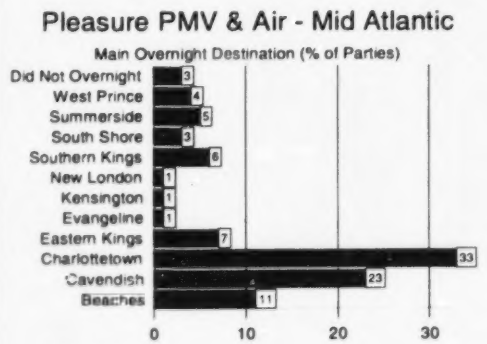

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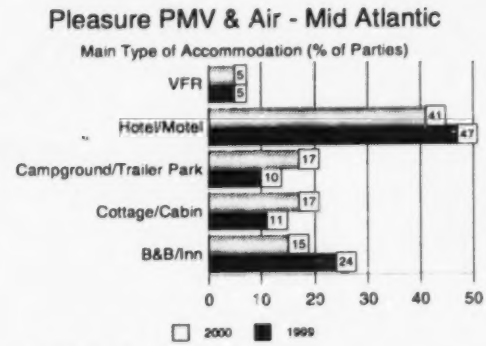
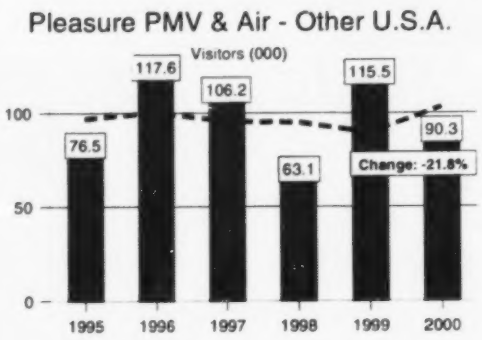


Exhibit 129

12. Other U.S.A.

"Other U.S.A." is another visitor origin region that experiences year-to-year fluctuations in visitations. Given the region's vast size and the inability to cost effectively market to the region, it is extremely difficult for Prince Edward Island to exert much influence over visitation patterns. Notable changes in 2000 include an increase in family income (Exhibit 138), and an 11% in market share held by visitors working full-time (Exhibit 139).



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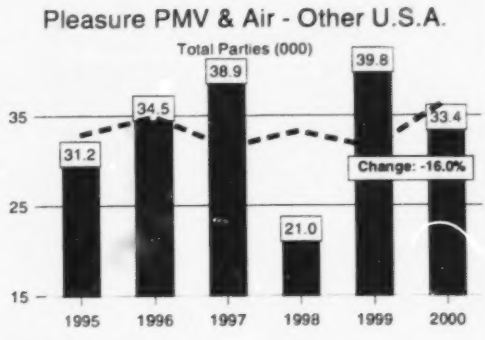

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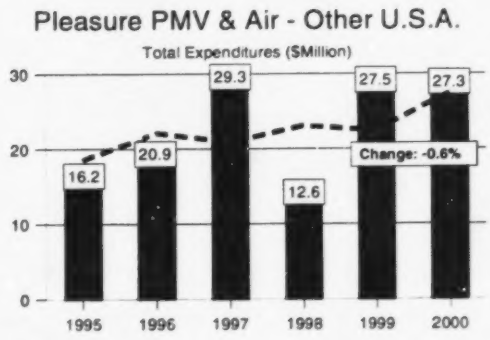

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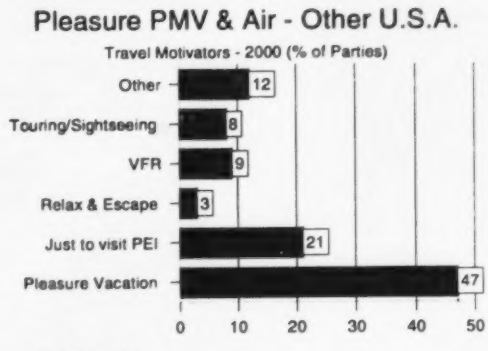

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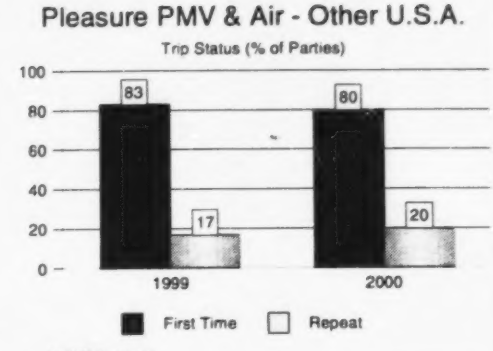

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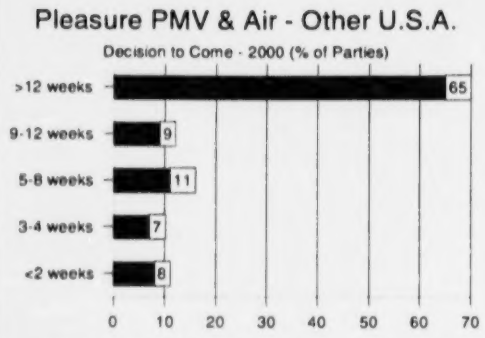

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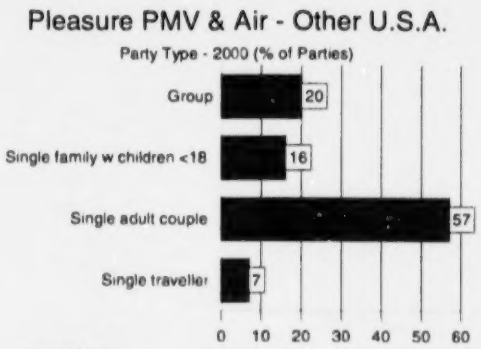

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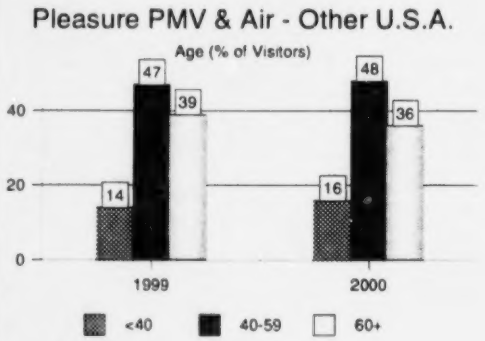

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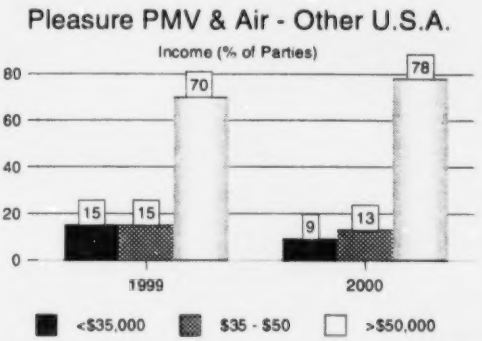

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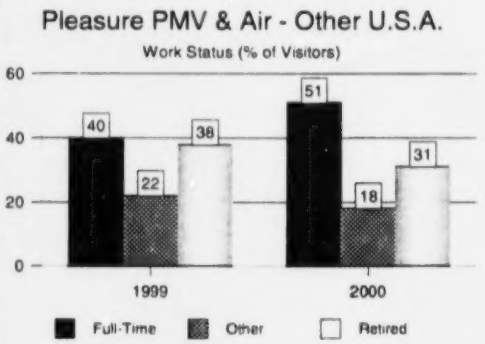

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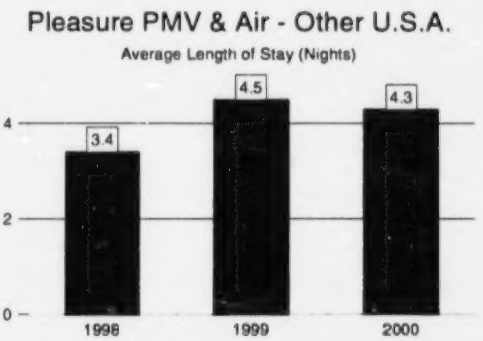

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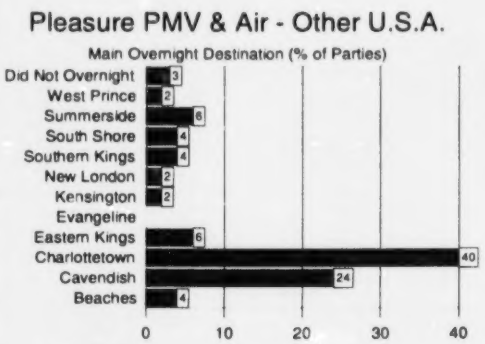

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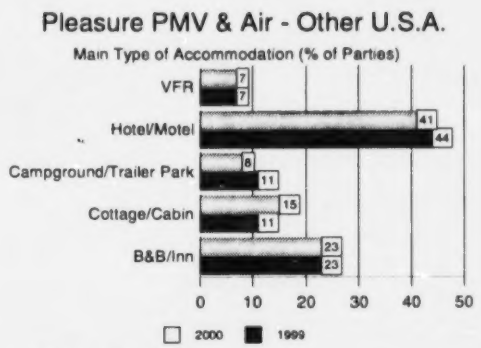
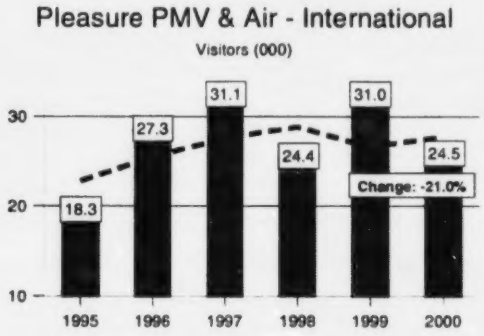


Exhibit 142

13. International

The "International" visitor origin region covers all geographic areas outside North America. In 2000, "International" visitors to Prince Edward Island represented an estimated 2.3% of all pleasure PMV and air visitors. A significant change in visitor profile was experienced in 2000, including: trip status (Exhibit 147); age, income and work status (Exhibits 150-152); and the mix of main type of accommodation (Exhibit 155).



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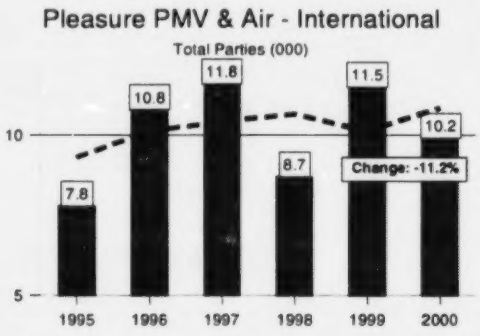

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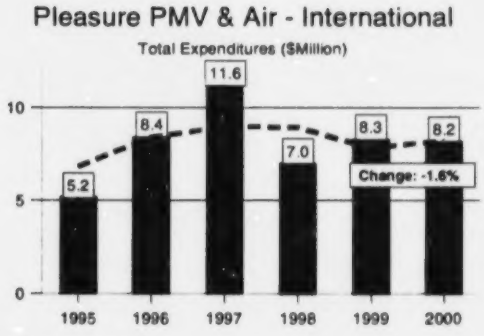

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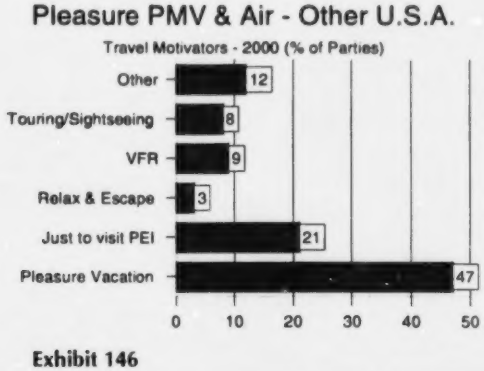

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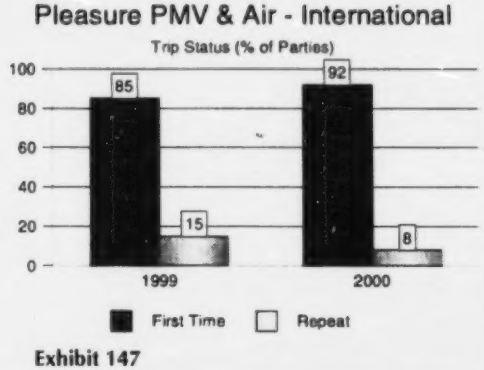

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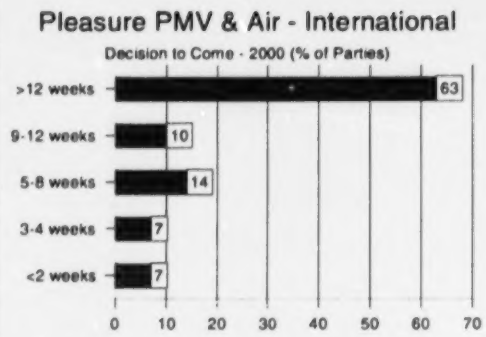

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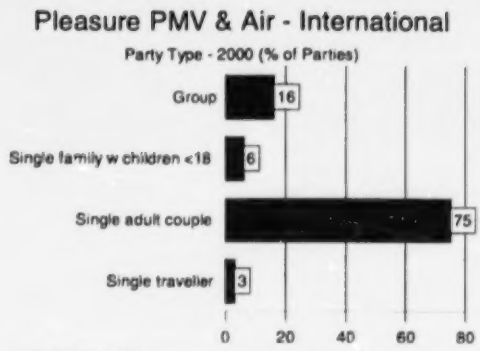

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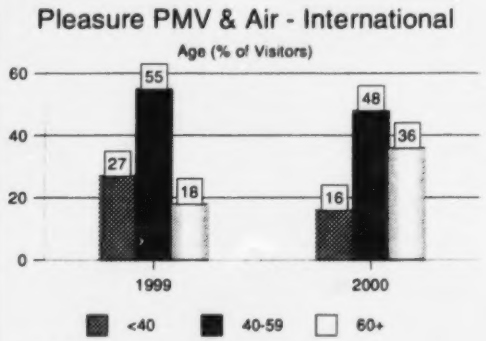

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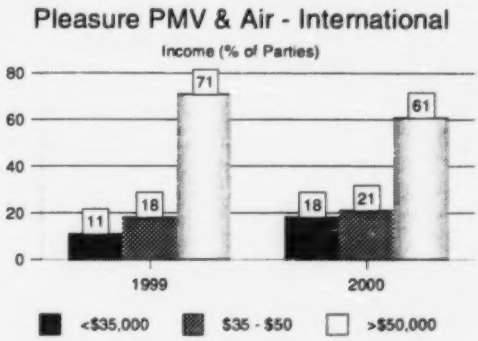

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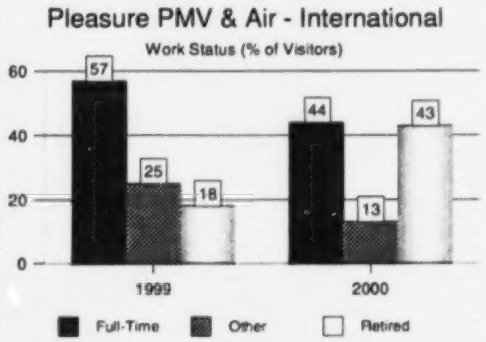

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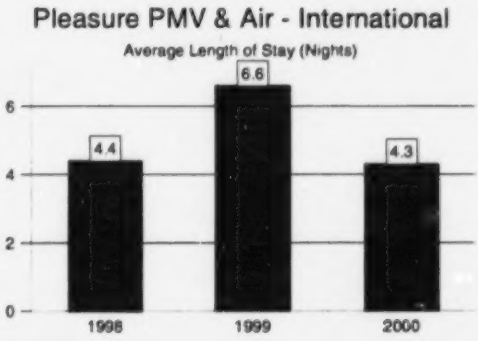

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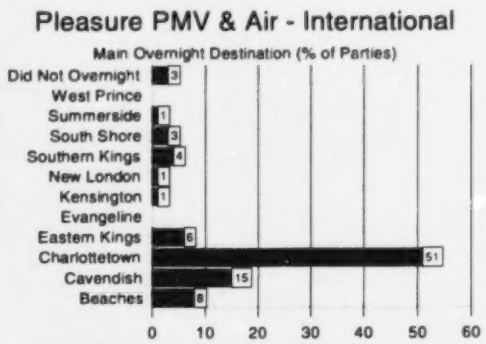

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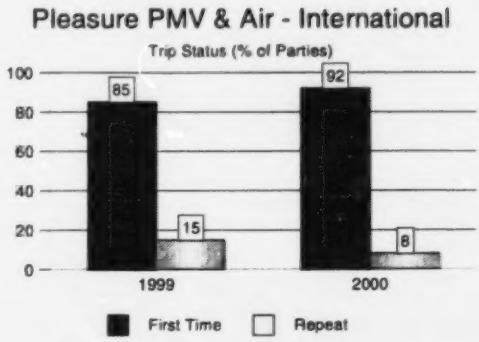


Exhibit 155

14. Business

Prince Edward Island enjoyed a strong tourism season in 1999 from business visitations. This was attributed to a large increase in the meetings and conventions market, and excellent weather for small, golf-oriented business groups.

The growth in 1999 could not be held in 2000, resulting in a 24.1% decline in business PMV and air visitors (Exhibit 156). In a reverse from 1999, the decline in 2000 can be attributed to far fewer meetings and conventions, and poor weather for the golfing business segment.

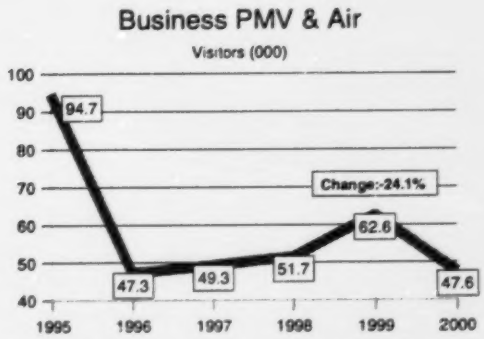


Exhibit 156

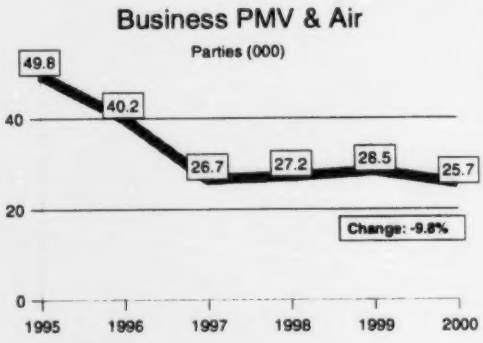


Exhibit 157

Despite the decline in business visitors, the estimate of total expenditures is up in 2000 (Exhibit 158). This could be possibly attributed to two factors:

1. A reported increase in average party expenditures of $169.00 among Maritime visitors who represent 51% of business parties.
2. A large increase in average party expenditures reported by visitors from Ontario. This may be a reflection of business visitors surveyed last year who had many of their expenditures paid for by others as opposed to visitors this year who paid for expenditures themselves.

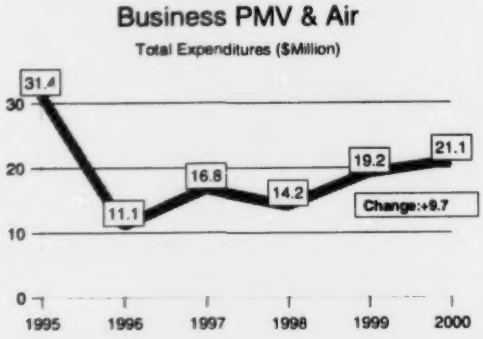


Exhibit 158

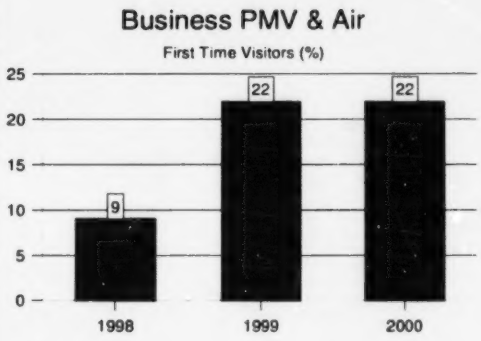
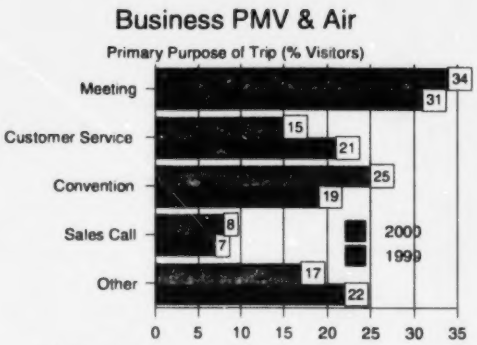


Exhibit 159



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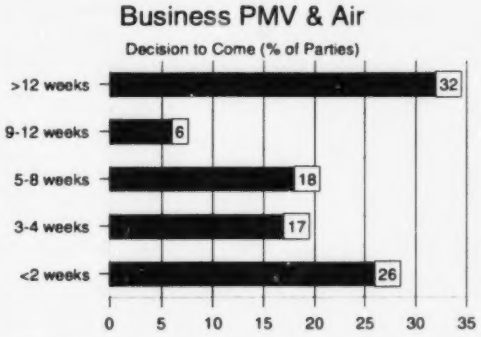

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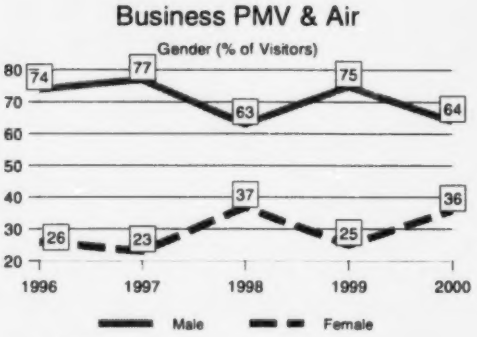

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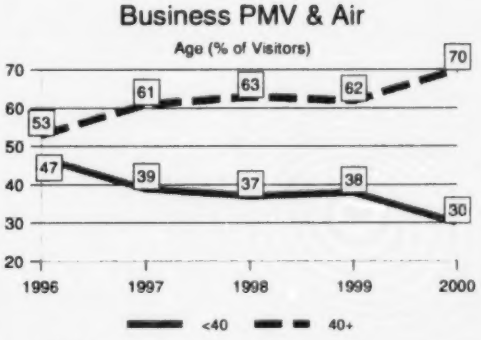

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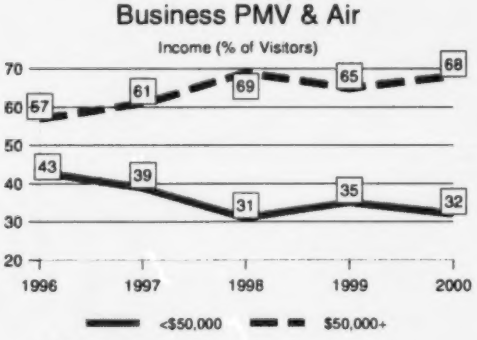

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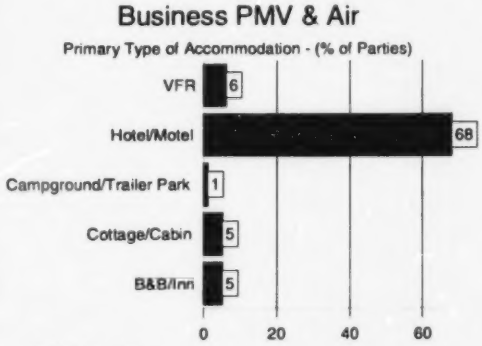

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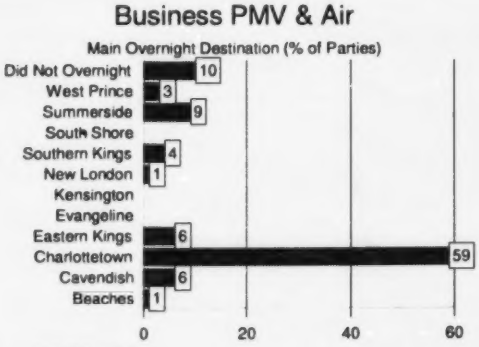


Exhibit 166

15. Motorcoach

Prince Edward Island's motorcoach market grew in 2000 by an estimated 13.1% visitors (Exhibit 167), representing the fifth consecutive year of growth. Notable changes among motorcoach visitors in 2000 include a significant shift to an older, more affluent, retired visitor (Exhibits 172-174).

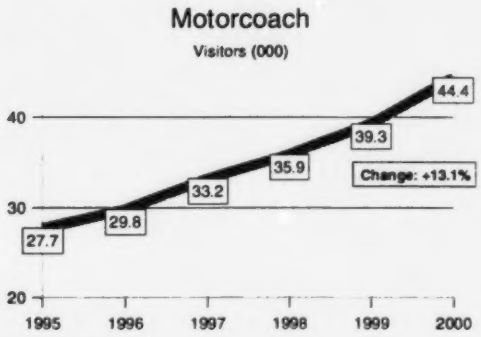
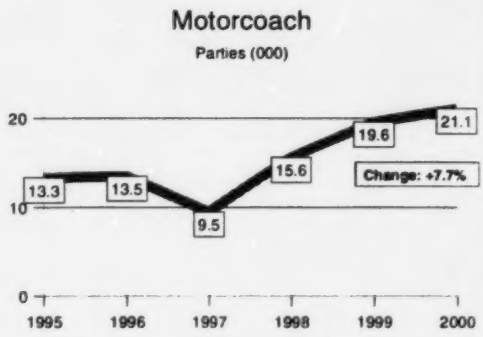


Exhibit 167



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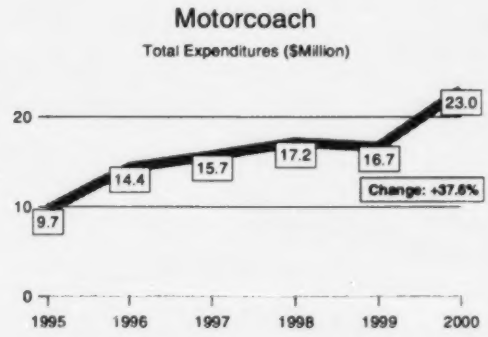

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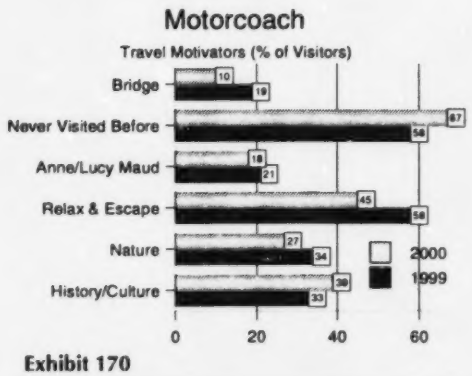

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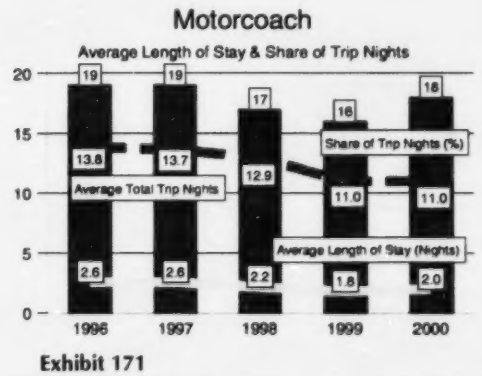
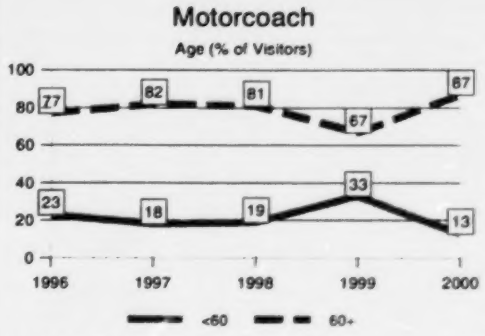


Exhibit 171



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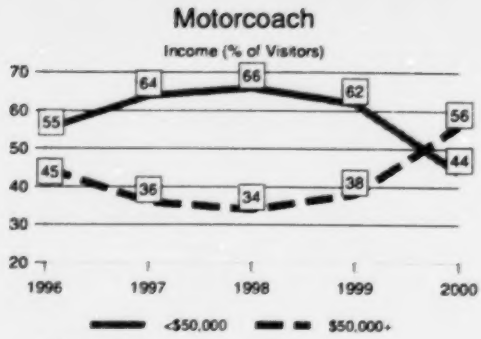

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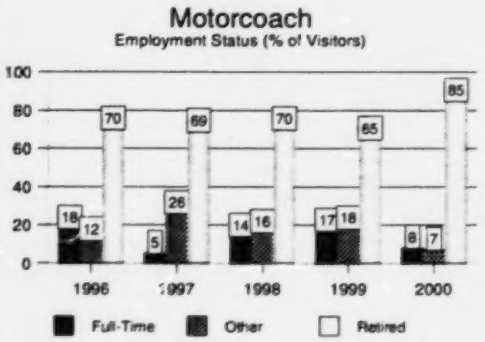

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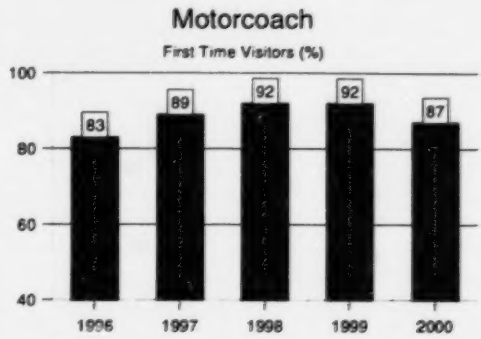

Exhibit 175

16. Japanese

Japanese visitations peaked at an estimated 12,000 visitors in 1996. Since that time, the number of visitors has steadily declined (Exhibit 176), with much of the decline being attributed to on-going economic weakness in Japan. Perhaps as a reflection of economic conditions, non-tour expenditures while visiting Prince Edward Island have declined steadily as well (Exhibit 179).

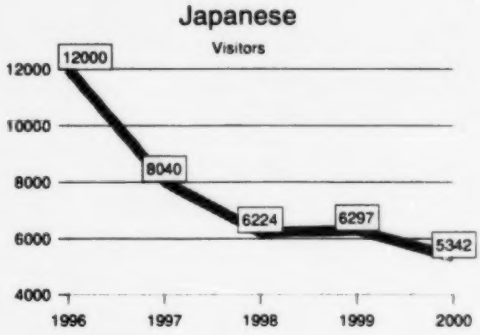

Exhibit 176

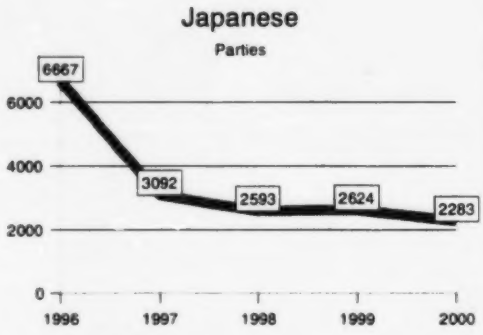

Exhibit 177

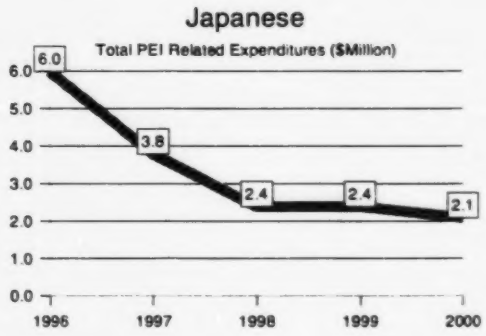

Exhibit 178

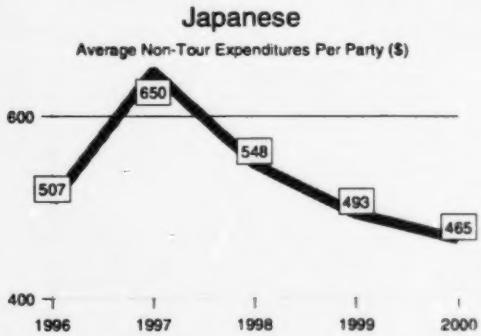

Exhibit 179

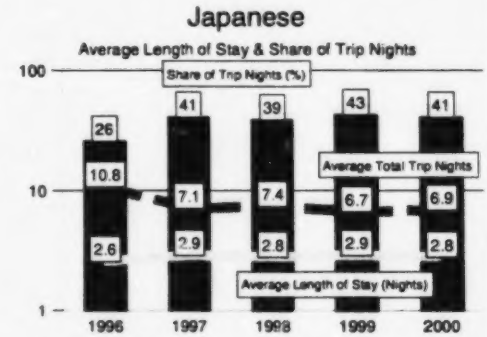

Exhibit 180

17.
Prince Edward Island's Tourism Regions

Section 17 reports summary estimates and descriptive statistics covering visitations, visitor profiles and visitor expenditures for 11 Prince Edward Island tourism regions. Due to the small sample sizes and resulting wide margins of error for most regions, readers should use this information with caution. Where possible, examining a three or four year trend may provide more useful insights into regional activity.

17a. Beaches Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 127 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±8.45%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 5.6% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the Beaches tourism region as their "main overnight destination" (MOD) (Exhibit 17-1).

17-1: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
47.8	37.1	59.5	57.0	73.6	60.9

Exhibit 17-2 below summarizes visitations to the Beaches tourism region in 2000 by visitor origin region. Exhibit 17-3 summarizes the main travel motivators for visitors claiming the Beaches as their MOD.

17-2: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	3	1
Nova Scotia	25	27
New Brunswick	10	6
Quebec	8	8
Ontario	23	22
Other Canada	6	6
New England	7	10
Mid Atlantic	6	11
Other USA	10	6
International	3	3

17-3: Main Travel Motivators (% Visitors)

Pleasure Vacation	53
Just to see/visit PEI	10
Relax/Escape	5
Visiting Friends/Relatives	11
Golf	7
Sports	1
Anne/LMM	2
Touring/Sightseeing	3
Confederation Bridge	1
Festivals and Events	
Other	7

While overnighting, visitors reporting the Beaches as their MOD stayed in the following accommodations (Exhibit 17-4).

17-4: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
5	44	20	28	4

17a. Beaches Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-5 summarizes average length of stay for the past six years.

17-5: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
5.7	5.5	5.5	6.0	5.4	5.1

For visitors reporting the Beaches as their MOD, Exhibit 17-6 summarizes how far in advance of travel the decision to come was made.

17-6: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
11	10	13	13	53

Exhibits 17-7 and 17-8 summarize average party expenditures and key expenditures categories.

17-7: Average Party Expenditure ($)	
1997	$710
1998	$731
1999	$724
2000	$933

17-8: Main Party Expenditures (% of Total Expenditures)	
Accommodations	37
Restaurant/Take-out meals	18
Groceries/Liquor	9
Admissions	6
Crafts/Souvenirs	9
Transportation	12

17-9: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	28%	31%	30%	34%	30%
	40+	72%	69%	70%	66%	70%
Income (% of Parties)	<$50,000	41%	32%	29%	40%	30%
	$50,000+	59%	68%	71%	60%	70%
Employment (% of Visitors)	Full-Time	59%	68%	67%	56%	58%
	Retired	26%	12%	19%	19%	20%
	Other	15%	20%	14%	25%	22%
Party Type (% of Parties)	Single Traveller					2%
	Single Adult Couple					53%
	Family w Children <18					29%
	Group					16%
Average Party Size		2.5	3.5	3.5	3.1	3.0
Trip Status	First Time	51%	46%	47%	43%	43%
	Repeat	49%	54%	53%	57%	57%

17b. Cavendish Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 553 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±3.61%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 25.1% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported Cavendish tourism region as their "main overnight destination" (MOD) (Exhibit 17-10).

17-10: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
150.3	148.2	285.3	319.4	321.3	272.9

Exhibit 17-11 below summarizes visitations to the Cavendish tourism region in 2000 by visitor origin region. Exhibit 17-12 summarizes the main travel motivators for visitors claiming Cavendish as their MOD.

17-11: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	5	4
Nova Scotia	21	18
New Brunswick	14	14
Quebec	12	9
Ontario	21	26
Other Canada	6	6
New England	7	8
Mid Atlantic	4	5
Other USA	8	8
International	2	1

17-12: Main Travel Motivators (% Visitors)

Pleasure Vacation	58
Just to see/visit PEI	13
Relax/Escape	3
Visiting Friends/Relatives	8
Golf	2
Sports	2
Anne/LMM	3
Touring/Sightseeing	4
Confederation Bridge	2
Festivals and Events	
Other	6

While overnighting, visitors reporting Cavendish as their MOD stayed in the following accommodations (Exhibit 17-13).

17-13: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
8	30	32	25	4

17b. Cavendish Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-14 summarizes average length of stay for the past six years.

17-14: Average Length of Stay (Nights)					
1995	1996	1997	1998	1999	2000
4.1	3.9	4.3	4.2	4.1	4.2

For visitors reporting Cavendish as their MOD, Exhibit 17-15 summarizes how far in advance of travel the decision to come was made.

17-15: Decision to Come (% Visitors)				
<2 Weeks	3-4 Weeks	5-8 Weeks	9-12 Weeks	>12 Weeks
15	13	17	8	48

Exhibits 17-16 and 17-17 summarize average party expenditures and key expenditures categories.

17-16: Average Party Expenditure ($)	
1997	$682
1998	$714
1999	$770
2000	$758

17-17: Main Party Expenditures (% of Total Expenditures)	
Accommodations	31
Restaurant/Take-out meals	24
Groceries/Liquor	9
Admissions	8
Crafts/Souvenirs	11
Transportation	12

17-18: Visitor Demographics for Region						
		1996	1997	1998	1999	2000
Age (% of Visitors)	<40	30%	33%	38%	39%	33%
	40+	70%	67%	62%	61%	67%
Income (% of Parties)	<$50,000	43%	40%	35%	41%	32%
	$50,000+	57%	60%	65%	59%	68%
Employment (% of Visitors)	Full-Time	53%	65%	66%	59%	66%
	Retired	33%	17%	21%	20%	17%
	Other	14%	18%	13%	21%	17%
Party Type (% of Parties)	Single Traveller					3%
	Single Adult Couple					36%
	Family w Children <18					43%
	Group					18%
Average Party Size		2.8	3.3	3.5	3.5	3.5
Trip Status	First Time	52%	55%	54%	45%	45%
	Repeat	48%	45%	46%	55%	55%

17c. Charlottetown Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 695 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±3.08%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 29.9% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported Charlottetown tourism region as their "main overnight destination" (MOD) (Exhibit 17-19).

17-19: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
218.6	259.3	344.8	353.6	342.3	325.1

Exhibit 17-20 below summarizes visitations to the Charlottetown tourism region in 2000 by visitor origin region. Exhibit 17-21 summarizes the main travel motivators for visitors claiming Charlottetown as their MOD.

17-20: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	2	4
Nova Scotia	19	17
New Brunswick	9	11
Quebec	6	7
Ontario	26	24
Other Canada	9	9
New England	6	7
Mid Atlantic	6	7
Other USA	6	11
International	13	4

17-21: Main Travel Motivators (% Visitors)

Pleasure Vacation	45
Just to see/visit PEI	15
Relax/Escape	2
Visiting Friends/Relatives	17
Golf	1
Sports	2
Anne/LMM	3
Touring/Sightseeing	5
Confederation Bridge	2
Festivals and Events	1
Other	6

While overnighting, visitors reporting Charlottetown as their MOD stayed in the following accommodations (Exhibit 17-22).

17-22: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
17	7	6	51	16

17c. Charlottetown Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-23 summarizes average length of stay for the past six years.

17-23: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
3.8	3.4	4.0	3.6	4.1	3.8

For visitors reporting Charlottetown as their MOD, Exhibit 17-24 summarizes how far in advance of travel the decision to come was made.

17-24: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
18	13	16	9	44

Exhibits 17-25 and 17-26 summarize average party expenditures and key expenditures categories.

17-25: Average Party Expenditure ($)	
1997	$620
1998	$595
1999	$643
2000	$711

17-26: Main Party Expenditures (% of Total Expenditures)	
Accommodations	32
Restaurant/Take-out meals	25
Groceries/Liquor	5
Admissions	6
Crafts/Souvenirs	10
Transportation	12

17-27: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	37%	24%	25%	25%	24%
	40+	63%	76%	75%	75%	76%
Income (% of Parties)	<$50,000	43%	35%	28%	40%	33%
	$50,000+	57%	65%	72%	60%	67%
Employment (% of Visitors)	Full-Time	40%	55%	56%	52%	56%
	Retired	43%	28%	26%	28%	23%
	Other	17%	17%	18%	20%	21%
Party Type (% of Parties)	Single Traveller					7%
	Single Adult Couple					49%
	Family w Children <18					21%
	Group					22%
Average Party Size		2.9	3.0	2.8	2.7	2.8
Trip Status	First Time	59%	54%	64%	49%	51%
	Repeat	41%	46%	36%	51%	49%

17d. Eastern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 159 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±7.49%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 7.4% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported Eastern Kings tourism region as their "main overnight destination" (MOD) (Exhibit 17-28).

17-28: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
34.2	29.6	35.7	45.6	47.9	80.5

Exhibit 17-29 below summarizes visitations to the Eastern Kings tourism region in 2000 by visitor origin region. Exhibit 17-30 summarizes the main travel motivators for visitors claiming Eastern Kings as their MOD.

17-29: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	1	2
Nova Scotia	27	25
New Brunswick	2	12
Quebec	13	8
Ontario	26	23
Other Canada	3	6
New England	15	11
Mid Atlantic	4	6
Other USA	5	6
International	6	2

17-30: Main Travel Motivators (% Visitors)

Pleasure Vacation	46
Just to see/visit PEI	6
Relax/Escape	3
Visiting Friends/Relatives	25
Golf	8
Sports	1
Anne/LMM	1
Touring/Sightseeing	3
Confederation Bridge	2
Festivals and Events	1
Other	6

While overnighting, visitors reporting Eastern Kings as their MOD stayed in the following accommodations (Exhibit 17-31).

17-31: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
11	28	14	20	22

17d. Eastern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-31 summarizes average length of stay for the past six years.

17-31: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
5.7	5.8	5.3	6.5	6.3	5.0

For visitors reporting Eastern Kings as their MOD, Exhibit 17-32 summarizes how far in advance of travel the decision to come was made.

17-32: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
20	13	21	7	40

Exhibits 17-33 and 17-34 summarize average party expenditures and key expenditures categories.

17-33: Average Party Expenditure ($)	
1997	$560
1998	$645
1999	$774
2000	$739

17-34: Main Party Expenditures (% of Total Expenditures)	
Accommodations	28
Restaurant/Take-out meals	23
Groceries/Liquor	11
Admissions	4
Crafts/Souvenirs	8
Transportation	14

17-35: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	26%	32%	23%	34%	25%
	40+	74%	68%	77%	66%	75%
Income (% of Parties)	<$50,000	40%	35%	35%	37%	26%
	$50,000+	60%	65%	65%	63%	74%
Employment (% of Visitors)	Full-Time	56%	68%	67%	60%	60%
	Retired	27%	16%	18%	24%	23%
	Other	17%	16%	15%	16%	17%
Party Type (% of Parties)	Single Traveller					4%
	Single Adult Couple					42%
	Family w Children <18					30%
	Group					24%
Average Party Size		2.1	2.7	3.1	3.0	3.1
Trip Status	First Time	32%	45%	37%	35%	29%
	Repeat	68%	55%	63%	65%	71%

17e. Evangeline Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 10 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±30.93%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 0.5% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the Evangeline tourism region as their "main overnight destination" (MOD) (Exhibit 17-36).

17-36: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
13.7	14.8	23.8	22.8	12.8	5.4

Exhibit 17-37 below summarizes visitations to the Evangeline tourism region in 2000 by visitor origin region. Exhibit 17-38 summarizes the main travel motivators for visitors claiming Evangeline as their MOD.

17-37: Visitor Origin (% Visitors)

	1999	2000
Newfoundland		
Nova Scotia	7	
New Brunswick	18	22
Quebec	15	7
Ontario	26	40
Other Canada	15	
New England	4	13
Mid Atlantic		2
Other USA	15	7
International		

17-38: Main Travel Motivators (% Visitors)

Pleasure Vacation	34
Just to see/visit PEI	36
Relax/Escape	20
Visiting Friends/Relatives	
Golf	
Sports	
Anne/LMM	
Touring/Sightseeing	
Confederation Bridge	
Festivals and Events	11
Other	

While overnighting, visitors reporting Evangeline as their MOD stayed in the following accommodations (Exhibit 17-39).

17-39: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Hostel
	28	11	42	20

17e. Evangeline Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-40 summarizes average length of stay for the past six years.

17-40: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
13.7	14.8	23.8	22.8	7.0	5.2

For visitors reporting Evangeline as their MOD, Exhibit 17-41 summarizes how far in advance of travel the decision to come was made.

17-41: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
26		22		52

Exhibits 17-42 and 17-43 summarize average party expenditures and key expenditures categories.

17-42: Average Party Expenditure ($)	
1997	$535
1998	$592
1999	$782
2000	$961

17-43: Main Party Expenditures (% of Total Expenditures)	
Accommodations	41
Restaurant/Take-out meals	17
Groceries/Liquor	7
Admissions	7
Crafts/Souvenirs	7
Transportation	17

17-42: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	52%	20%	29%	40%	43%
	40+	48%	80%	71%	60%	57%
Income (% of Parties)	<$50,000	53%	20%	53%	30%	9%
	$50,000+	47%	80%	47%	70%	91%
Employment (% of Visitors)	Full-Time	44%	59%	57%	67%	46%
	Retired	31%	27%	24%	15%	30%
	Other	25%	14%	19%	18%	24%
Party Type (% of Parties)	Single Traveller					20%
	Single Adult Couple					54%
	Family w Children <18					16%
	Group					10%
Average Party Size		2.1	2.6	2.9	2.7	2.3
Trip Status	First Time	38%	59%	33%	37%	45%
	Repeat	62%	41%	67%	63%	55%

17f. Kensington Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 43 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±14.8%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 1.9% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the Kensington tourism region as their "main overnight destination" (MOD) (Exhibit 17-43).

17-43: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
27.3	22.2	35.7	45.6	38.5	20.7

Exhibit 17-44 below summarizes visitations to the Kensington tourism region in 2000 by visitor origin region. Exhibit 17-45 summarizes the main travel motivators for visitors claiming Kensington as their MOD.

17-44: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	4	4
Nova Scotia	15	21
New Brunswick	21	24
Quebec	4	2
Ontario	29	15
Other Canada	7	13
New England	6	13
Mid Atlantic	2	2
Other USA	8	7
International	4	2

17-45: Main Travel Motivators (% Visitors)

Pleasure Vacation	52
Just to see/visit PEI	15
Relax/Escape	
Visiting Friends/Relatives	27
Golf	
Sports	
Anne/LMM	1
Touring/Sightseeing	
Confederation Bridge	5
Festivals and Events	
Other	

While overnighting, visitors reporting Kensington as their MOD stayed in the following accommodations (Exhibit 17-46).

17-46: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
15	48	15	2	11

17f. Kensington Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-47 summarizes average length of stay for the past six years.

17-47: Average Length of Stay (Nights)					
1995	1996	1997	1998	1999	2000
5.5	6.8	6.3	5.3	4.8	5.3

For visitors reporting Kensington as their MOD, Exhibit 17-48 summarizes how far in advance of travel the decision to come was made.

17-47: Decision to Come (% Visitors)				
<2 Weeks	3-4 Weeks	5-8 Weeks	9-12 Weeks	>12 Weeks
19	23	2	8	48

Exhibits 17-48 and 17-49 summarize average party expenditures and key expenditures categories.

17-48: Average Party Expenditure ($)	
1997	$705
1998	$645
1999	$685
2000	$748

17-49: Main Party Expenditures (% of Total Expenditures)	
Accommodations	25
Restaurant/Take-out meals	22
Groceries/Liquor	10
Admissions	6
Crafts/Souvenirs	13
Transportation	12

17-50: Visitor Demographics for Region						
		1996	1997	1998	1999	2000
Age (% of Visitors)	<40	33%	33%	26%	40%	29%
	40+	67%	67%	74%	60%	71%
Income (% of Parties)	<$50,000	39%	51%	33%	41%	36%
	$50,000+	61%	49%	67%	59%	64%
Employment (% of Visitors)	Full-Time	53%	53%	47%	65%	50%
	Retired	26%	25%	31%	22%	30%
	Other	21%	22%	22%	13%	20%
Party Type (% of Parties)	Single Traveller					7%
	Single Adult Couple					33%
	Family w Children <18					35%
	Group					24%
Average Party Size		2.4	3.4	3.4	3.5	3.4
Trip Status	First Time	36%	37%	41%	32%	27%
	Repeat	64%	63%	59%	68%	73%

17g. New London Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 31 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of ±17.48%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 1.3% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the New London tourism region as their "main overnight destination" (MOD) (Exhibit 17-51).

17-51: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
6.8	14.8	23.8	22.8	10.3	14.1

Exhibit 17-52 below summarizes visitations to the New London tourism region in 2000 by visitor origin region. Exhibit 17-53 summarizes the main travel motivators for visitors claiming New London as their MOD.

17-52: Visitor Origin (% Visitors)

	1999	2000
Newfoundland		5
Nova Scotia	24	36
New Brunswick	14	8
Quebec	5	
Ontario	33	7
Other Canada	5	7
New England	14	16
Mid Atlantic	5	5
Other USA		6
International		2

17-53: Main Travel Motivators (% Visitors)

Pleasure Vacation	72
Just to see/visit PEI	4
Relax/Escape	
Visiting Friends/Relatives	12
Golf	6
Sports	
Anne/LMM	1
Touring/Sightseeing	
Confederation Bridge	
Festivals and Events	6
Other	

While overnighting, visitors reporting New London as their MOD stayed in the following accommodations (Exhibit 17-54).

17-54: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
15	52		19	11

17g. New London Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-55 summarizes average length of stay for the past six years.

17-55: Average Length of Stay (Nights)					
1995	1996	1997	1998	1999	2000
5.0	4.3	6.2	7.5	5.3	5.4

For visitors reporting New London as their MOD, Exhibit 17-56 summarizes how far in advance of travel the decision to come was made.

17-56: Decision to Come (% Visitors)				
<2 Weeks	3-4 Weeks	5-8 Weeks	9-12 Weeks	>12 Weeks
15	10	19	2	53

Exhibits 17-57 and 17-58 summarize average party expenditures and key expenditures categories.

17-57: Average Party Expenditure ($)	
1997	$536
1998	$592
1999	$1,624
2000	$928

17-58: Main Party Expenditures (% of Total Expenditures)	
Accommodations	41
Restaurant/Take-out meals	19
Groceries/Liquor	10
Admissions	6
Crafts/Souvenirs	7
Transportation	9

17-59: Visitor Demographics for Region						
		1996	1997	1998	1999	2000
Age (% of Visitors)	<40	23%	33%	26%	29%	41%
	40+	77%	67%	74%	71%	59%
Income (% of Parties)	<$50,000	39%	21%	41%	34%	29%
	$50,000+	61%	79%	59%	66%	71%
Employment (% of Visitors)	Full-Time	53%	53%	47%	65%	63%
	Retired	26%	21%	20%	14%	10%
	Other	21%	26%	33%	21%	27%
Party Type (% of Parties)	Single Traveller					3%
	Single Adult Couple					32%
	Family w Children <18					46%
	Group					19%
Average Party Size		2.7	2.6	2.8	3.8	4.0
Trip Status	First Time	43%	42%	40%	27%	31%
	Repeat	57%	58%	60%	73%	69%

17h. Southern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 124 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that valùes are accurate within a ran ge of±8.55%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 5.4% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported Southern Kings tourism region as their "main overnight destination" (MOD) (Exhibit 17-60).

17-60: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
41.0	25.2	47.6	57.0	71.3	58.7

Exhibit 17-61 below summarizes visitations to the Southern Kings tourism region in 2000 by visitor origin region. Exhibit 17-62 summarizes the main travel motivators for visitors claiming Southern Kings as their MOD.

17-61: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	3	4
Nova Scotia	27	19
New Brunswick	4	9
Quebec	7	7
Ontario	33	24
Other Canada	5	11
New England	7	12
Mid Atlantic	4	6
Other USA	8	6
International	2	2

17-62: Main Travel Motivators (% Visitors)

Pleasure Vacation	42
Just to see/visit PEI	11
Relax/Escape	4
Visiting Friends/Relatives	24
Golf	1
Sports	
Anne/LMM	1
Touring/Sightseeing	3
Confederation Bridge	
Festivals and Events	1
Other	5

While overnighting, visitors reporting Southern Kings as their MOD stayed in the following accommodations (Exhibit 17-63).

17-63: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
13	24	13	26	21

17h. Southern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-64 summarizes average length of stay for the past six years.

17-64: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
6.3	5.4	5.0	4.5	5.4	4.3

For visitors reporting Southern Kings as their MOD, Exhibit 17-65 summarizes how far in advance of travel the decision to come was made.

17-65: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
15	7	10	10	58

Exhibits 17-66 and 17-67 summarize average party expenditures and key expenditures categories.

17-66: Average Party Expenditure ($)	
1997	$576
1998	$596
1999	$688
2000	$694

17-67: Main Party Expenditures (% of Total Expenditures)	
Accommodations	25
Restaurant/Take-out meals	22
Groceries/Liquor	10
Admissions	4
Crafts/Souvenirs	9
Transportation	17

17-68: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	11%	28%	27%	29%	25%
	40+	89%	72%	73%	71%	75%
Income (% of Parties)	<$50,000	43%	40%	28%	35%	38%
	$50,000+	57%	60%	72%	65%	62%
Employment (% of Visitors)	Full-Time	44%	57%	60%	55%	58%
	Retired	46%	27%	27%	18%	22%
	Other	10%	16%	13%	27%	20%
Party Type (% of Parties)	Single Traveller					11%
	Single Adult Couple					48%
	Family w Children <18					19%
	Group					23%
Average Party Size		2.2	2.8	3.1	3.1	3.1
Trip Status	First Time	43%	39%	35%	36%	34%
	Repeat	57%	61%	65%	64%	66%

17i. South Shore Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 89 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of ±10.18%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 4.5% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the South Shore tourism region as their "main overnight destination" (MOD) (Exhibit 17-69).

17-69: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
27.3	14.8	47.6	57.0	53.7	48.9

Exhibit 17-70 below summarizes visitations to the South Shore tourism region in 2000 by visitor origin region. Exhibit 17-71 summarizes the main travel motivators for visitors claiming South Shore as their MOD.

17-70: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	3	
Nova Scotia	21	21
New Brunswick	9	13
Quebec	3	4
Ontario	29	31
Other Canada	8	7
New England	9	10
Mid Atlantic	3	4
Other USA	12	7
International	3	1

17-71: Main Travel Motivators (% Visitors)

Pleasure Vacation	38
Just to see/visit PEI	16
Relax/Escape	3
Visiting Friends/Relatives	28
Golf	
Sports	3
Anne/LMM	2
Touring/Sightseeing	5
Confederation Bridge	
Festivals and Events	1
Other	4

While overnighting, visitors reporting South Shore as their MOD stayed in the following accommodations (Exhibit 17-72).

17-72: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
12	38	20	11	19

17i. South Shore Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-73 summarizes average length of stay for the past six years.

17-73: Average Length of Stay (Nights)					
1995	1996	1997	1998	1999	2000
5.0	4.6	6.1	5.6	5.5	4.6

For visitors reporting South Shore as their MOD, Exhibit 17-74 summarizes how far in advance of travel the decision to come was made.

17-74: Decision to Come (% Visitors)				
<2 Weeks	3-4 Weeks	5-8 Weeks	9-12 Weeks	>12 Weeks
18	8	10	7	57

Exhibits 17-75 and 17-76 summarize average party expenditures and key expenditures categories.

17-75: Average Party Expenditure ($)	
1997	$700
1998	$596
1999	$666
2000	$635

17-76: Main Party Expenditures (% of Total Expenditures)	
Accommodations	23
Restaurant/Take-out meals	20
Groceries/Liquor	14
Admissions	6
Crafts/Souvenirs	9
Transportation	18

17-77: Visitor Demographics for Region						
		1996	1997	1998	1999	2000
Age (% of Visitors)	<40	34%	25%	19%	31%	20%
	40+	66%	75%	81%	69%	80%
Income (% of Parties)	<$50,000	48%	39%	46%	35%	42%
	$50,000+	52%	61%	54%	65%	58%
Employment (% of Visitors)	Full-Time	59%	54%	48%	44%	56%
	Retired	25%	28%	34%	28%	22%
	Other	16%	18%	18%	28%	22%
Party Type (% of Parties)	Single Traveller					4%
	Single Adult Couple					44%
	Family w Children <18					34%
	Group					17%
Average Party Size		2.4	3.3	2.9	3.2	3.0
Trip Status	First Time	43%	39%	35%	36%	35%
	Repeat	57%	61%	65%	64%	65%

17j. Summerside Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 174 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of ±7.13%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 8.5% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported the Summerside tourism region as their "main overnight destination" (MOD) (Exhibit 17-78).

17-78: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
75.2	111.2	130.8	114.1	99.3	92.4

Exhibit 17-79 below summarizes visitations to the Summerside tourism region in 2000 by visitor origin region. Exhibit 17-80 summarizes the main travel motivators for visitors claiming Summerside as their MOD.

17-79: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	2	2
Nova Scotia	26	24
New Brunswick	9	8
Quebec	8	6
Ontario	28	30
Other Canada	9	10
New England	8	11
Mid Atlantic	3	3
Other USA	6	6
International	1	

17-80: Main Travel Motivators (% Visitors)

Pleasure Vacation	40
Just to see/visit PEI	15
Relax/Escape	1
Visiting Friends/Relatives	23
Golf	1
Sports	5
Anne/LMM	1
Touring/Sightseeing	4
Confederation Bridge	4
Festivals and Events	
Other	6

While overnighting, visitors reporting Summerside as their MOD stayed in the following accommodations (Exhibit 17-81).

17-81: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
8	10	7	54	21

17j. Summerside Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-82 summarizes average length of stay for the past six years.

17-82: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
4.4	3.9	4.4	4.4	4.6	4.2

For visitors reporting Summerside as their MOD, Exhibit 17-83 summarizes how far in advance of travel the decision to come was made.

17-83: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
15	18	14	7	46

Exhibits 17-84 and 17-85 summarize average party expenditures and key expenditures categories.

17-84: Average Party Expenditure ($)	
1997	$603
1998	$620
1999	$669
2000	$738

17-85: Main Party Expenditures (% of Total Expenditures)	
Accommodations	28
Restaurant/Take-out meals	26
Groceries/Liquor	6
Admissions	6
Crafts/Souvenirs	9
Transportation	15

17-86: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	29%	24%	18%	25%	28%
	40+	71%	76%	82%	75%	72%
Income (% of Parties)	<$50,000	46%	47%	42%	40%	31%
	$50,000+	54%	53%	58%	60%	69%
Employment (% of Visitors)	Full-Time	50%	60%	56%	52%	60%
	Retired	35%	25%	34%	32%	20%
	Other	15%	15%	10%	16%	20%
Party Type (% of Parties)	Single Traveller					8%
	Single Adult Couple					43%
	Family w Children <18					32%
	Group					17%
Average Party Size		2.5	2.9	3.1	2.8	2.8
Trip Status	First Time	41%	48%	49%	62%	33%
	Repeat	59%	52%	51%	38%	67%

17k. West Prince Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information for this re gion is based on 73 responses from the 2000 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a ran ge of±11.28%.

Based upon the 2000 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 3.4% of all pleasure PMV and air visitors to Prince Edward Island between May 15th and October 31st reported West Prince tourism region as their "main overnight destination" (MOD) (Exhibit 17-87).

17-87: Pleasure PMV & Air Visitors (000)

1995	1996	1997	1998	1999	2000
34.2	31.1	59.5	45.6	38.6	37.0

Exhibit 17-88 below summarizes visitations to the West Prince tourism region in 2000 by visitor origin region. Exhibit 17-89 summarizes the main travel motivators for visitors claiming West Prince as their MOD.

17-88: Visitor Origin (% Visitors)

	1999	2000
Newfoundland	3	1
Nova Scotia	6	21
New Brunswick	11	19
Quebec	5	7
Ontario	46	22
Other Canada	5	6
New England	11	13
Mid Atlantic	5	7
Other USA	5	4
International	4	

17-89: Main Travel Motivators (% Visitors)

Pleasure Vacation	37
Just to see/visit PEI	10
Relax/Escape	2
Visiting Friends/Relatives	42
Golf	1
Sports	1
Anne/LMM	
Touring/Sightseeing	1
Confederation Bridge	1
Festivals and Events	3
Other	3

While overnighting, visitors reporting West Prince as their MOD stayed in the following accommodations (Exhibit 17-90).

17-90: Main Type of Accommodation (% Visitors)

B&B/Inn	Cabin/Cottage	Campground	Hotel/Motel	Non-Paid
20	19	16	14	37

17k. West Prince Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Exhibit 17-91 summarizes average length of stay for the past six years.

17-91: Average Length of Stay (Nights)					
1995	**1996**	**1997**	**1998**	**1999**	**2000**
7.3	7.3	5.1	6.6	7.3	4.6

For visitors reporting West Prince as their MOD, Exhibit 17-92 summarizes how far in advance of travel the decision to come was made.

17-92: Decision to Come (% Visitors)				
<2 Weeks	**3-4 Weeks**	**5-8 Weeks**	**9-12 Weeks**	**>12 Weeks**
18	11	9	13	49

Exhibits 17-93 and 17-94 summarize average party expenditures and key expenditures categories.

17-93: Average Party Expenditure ($)	
1997	$630
1998	$692
1999	$699
2000	$682

17-94: Main Party Expenditures (% of Total Expenditures)	
Accommodations	20
Restaurant/Take-out meals	22
Groceries/Liquor	12
Admissions	8
Crafts/Souvenirs	11
Transportation	17

17-95: Visitor Demographics for Region						
		1996	**1997**	**1998**	**1999**	**2000**
Age (% of Visitors)	<40	32%	27%	18%	23%	42%
	40+	68%	73%	82%	77%	58%
Income (% of Parties)	<$50,000	64%	41%	50%	35%	33%
	$50,000+	36%	59%	50%	65%	67%
Employment (% of Visitors)	Full-Time	55%	58%	56%	53%	57%
	Retired	28%	21%	30%	29%	29%
	Other	17%	21%	14%	18%	14%
Party Type (% of Parties)	Single Traveller					8%
	Single Adult Couple					44%
	Family w Children <18					35%
	Group					14%
Average Party Size		2.9	3.0	2.9	2.8	2.9
Trip Status	First Time	52%	38%	39%	36%	32%
	Repeat	48%	62%	61%	64%	68%